

# ENDNOTE X7

THE LITTLE ENDNOTE HOW-TO BOOK



## INTRODUCTION

The first thing you need to know is this is not a manual. It will not tell you which operating system any given version of EndNote is compatible with or how much RAM you need to run EndNote. It will not try to cover each finicky detail of what EndNote can do.

So what is it?

This is a book of instructions on how to accomplish specific tasks in EndNote, such as importing references from a specific online database or converting references kept in another program to references in an EndNote library. The author will try to keep the screenshots and instructions as current as possible, which means there may be frequent new editions of this book. The first edition of this little book will be quite small, but it may grow over time. The goal will always be the same, though—to teach you how to make EndNote do the things you want it to do.

Thank you for using EndNote!

# TABLE OF CONTENTS

<b>1</b>	<b>USING DIRECT EXPORT TO IMPORT REFERENCES FROM ONLINE DATABASES</b>	<b>5</b>
<b>1.1</b>	<b>THOMSON REUTERS WEB OF SCIENCE</b>	<b>5</b>
1.1.1	Using the Marked List	5
1.1.2	Not Using the Marked List	6
<b>1.2</b>	<b>DIRECT EXPORT FROM PUBMED</b>	<b>8</b>
1.2.1	Using the Clipboard	8
1.2.2	Not Using the Clipboard	10
<b>1.3</b>	<b>BROWSER ACTIONS WITH DIRECT EXPORT</b>	<b>12</b>
1.3.1	Firefox on Windows	12
1.3.2	Firefox on Macintosh	14
1.3.3	Internet Explorer on Windows	15
1.3.4	Google Chrome on Windows	16
<b>1.4</b>	<b>ENDNOTE ONLINE PLUG-INS FOR DIRECT EXPORT</b>	<b>17</b>
1.4.1	Internet Explorer	17
1.4.2	Firefox	17
<b>2</b>	<b>IMPORTING PDF FILES AND PDF HANDLING</b>	<b>19</b>
<b>2.1</b>	<b>IMPORTING PDF FILES</b>	<b>19</b>
2.1.1	Importing a Folder of PDF Files on Windows	19
2.1.2	Importing a Folder of PDF Files on Macintosh	20
<b>2.2</b>	<b>SETTING PDF HANDLING PREFERENCES</b>	<b>21</b>
2.2.1	Windows	21
2.2.2	Macintosh	22
<b>3</b>	<b>CONVERTING FROM OTHER REFERENCING SOFTWARE</b>	<b>24</b>
<b>3.1</b>	<b>CONVERTING FROM REFERENCE MANAGER TO ENDNOTE</b>	<b>24</b>
3.1.1	Converting the Reference Manager Database	24
3.1.2	Converting Reference Manager Attachments to EndNote Attachments	28
3.1.3	Converting Word Documents with Reference Manager Citations	30
<b>4</b>	<b>CITE WHILE YOU WRITE</b>	<b>33</b>
<b>4.1</b>	<b>CITE WHILE YOU WRITE IN MICROSOFT WORD ON WINDOWS</b>	<b>33</b>
4.1.1	Installing the Cite While You Write Tools	33
4.1.2	Adding Citations to a Document Using Insert Citation	33
4.1.3	Adding Citations to a Document Using Insert Selected Citations	35
4.1.4	Selecting the EndNote Style for Your Citations and Bibliography	35
4.1.5	Editing Citations in the Document	36
<b>4.2</b>	<b>CITE WHILE YOU WRITE IN MICROSOFT WORD ON MACINTOSH</b>	<b>38</b>

4.2.1	Installing the Cite While You Write Tools .....	38
4.2.2	Adding Citations to a Document Using Insert Citation.....	38
4.2.3	Adding Citations to a Document Using Insert Selected Citations .....	40
4.2.4	Selecting the EndNote Style for Your Citations and Bibliography .....	41
4.2.5	Editing Citations in the Document .....	42
<b>5</b>	<b>INDEX .....</b>	<b>46</b>

# 1 USING DIRECT EXPORT TO IMPORT REFERENCES FROM ONLINE DATABASES

## 1.1 THOMSON REUTERS WEB OF SCIENCE

### 1.1.1 Using the Marked List

- Perform your search on the Web of Science.
- Mark the references you want to add to the Marked List, and click on the **Add to Marked List** button.

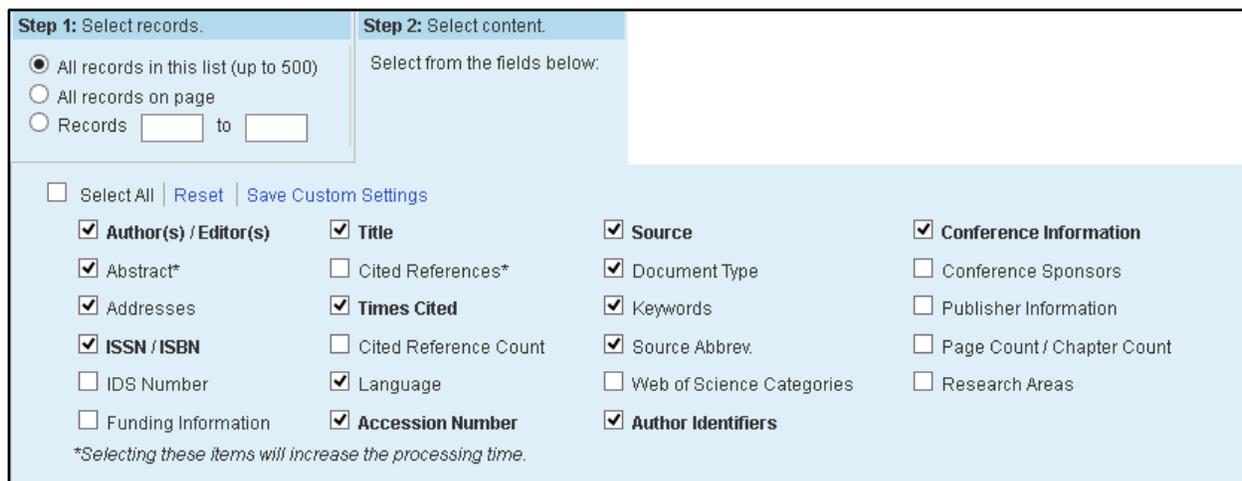


- When ready to export, go to the Marked List by clicking the **Marked List** button.



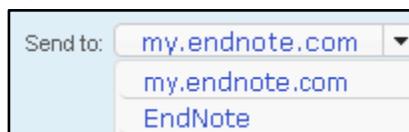
Select the records you want to import in Step 1 of the window shown below (usually "All records in this list" if 500 or less).

- Select the fields you want to import in Step 2 of the window shown below.

A screenshot of a web interface divided into two main sections: "Step 1: Select records." and "Step 2: Select content." Step 1 includes radio buttons for "All records in this list (up to 500)", "All records on page", and "Records [ ] to [ ]". Step 2 includes a "Select from the fields below:" section with a grid of checkboxes for various fields. The "Send to" dropdown menu is visible at the bottom of the interface.

Step 1: Select records.		Step 2: Select content.	
<input checked="" type="radio"/> All records in this list (up to 500)		Select from the fields below:	
<input type="radio"/> All records on page			
<input type="radio"/> Records [ ] to [ ]			
<input type="checkbox"/> Select All   <a href="#">Reset</a>   <a href="#">Save Custom Settings</a>			
<input checked="" type="checkbox"/> Author(s) / Editor(s)	<input checked="" type="checkbox"/> Title	<input checked="" type="checkbox"/> Source	<input checked="" type="checkbox"/> Conference Information
<input checked="" type="checkbox"/> Abstract*	<input type="checkbox"/> Cited References*	<input checked="" type="checkbox"/> Document Type	<input type="checkbox"/> Conference Sponsors
<input checked="" type="checkbox"/> Addresses	<input checked="" type="checkbox"/> Times Cited	<input checked="" type="checkbox"/> Keywords	<input type="checkbox"/> Publisher Information
<input checked="" type="checkbox"/> ISSN / ISBN	<input type="checkbox"/> Cited Reference Count	<input checked="" type="checkbox"/> Source Abbrev.	<input type="checkbox"/> Page Count / Chapter Count
<input type="checkbox"/> IDS Number	<input checked="" type="checkbox"/> Language	<input type="checkbox"/> Web of Science Categories	<input type="checkbox"/> Research Areas
<input type="checkbox"/> Funding Information	<input checked="" type="checkbox"/> Accession Number	<input checked="" type="checkbox"/> Author Identifiers	
<small>*Selecting these items will increase the processing time.</small>			

- Select **EndNote** from the drop-down **Send to** list.



- At this point your browser will need to send the file to EndNote. Different browsers will react differently at this point. Click on your browser below for instructions on how to proceed for your browser the first time you attempt direct export in that browser. Note that the file type shown will be different for different databases. For Web of Science it will end with a .ciw extension.
  - Firefox on Windows

- Firefox on Macintosh
- Internet Explorer on Windows
- Google Chrome on Windows
- Google Chrome on Macintosh

Chrome on the Macintosh does not support direct export.

- Safari on Macintosh

Safari does not support direct export.

### 1.1.2 Not Using the Marked List

- Perform your search on the Web of Science and select the references you want to import. Then select **EndNote** from the drop-down Send to list.



- You will see a window like the one below if you have selected references by marking them, and will not need to do anything further to select references.



- If you have not selected references, you will see a window like this, and need to select either all the records on the page or a range of records.



- With either of the options above, you will now need to select the fields to export. Select the **Full Record** option to get the keywords and author's address as well as the main bibliographic information.

**Send to EndNote**

**Number of Records:**  All records on page  
 Records  to

**Record Content:** Author, Title, Source ▼  
 Author, Title, Source  
 Author, Title, Source, Abstract  
**Full Record**  
 Full Record and Cited References

- Then click the **Send** button.

**Send to EndNote**

**Number of Records:**  All records on page  
 Records  to

**Record Content:** Full Record ▼

**Send** | **Cancel**

At this point your browser will need to send the file to EndNote. Different browsers will react differently at this point. Click on your browser below for instructions on how to proceed for your browser the first time you attempt direct export in that browser. Note that the file type shown will be different for different databases. For Web of Science it will end with a .ciw extension.

- Firefox on Windows
- Firefox on Macintosh
- Internet Explorer on Windows
- Google Chrome on Windows
- Google Chrome on Macintosh

Chrome on the Macintosh does not support direct export.

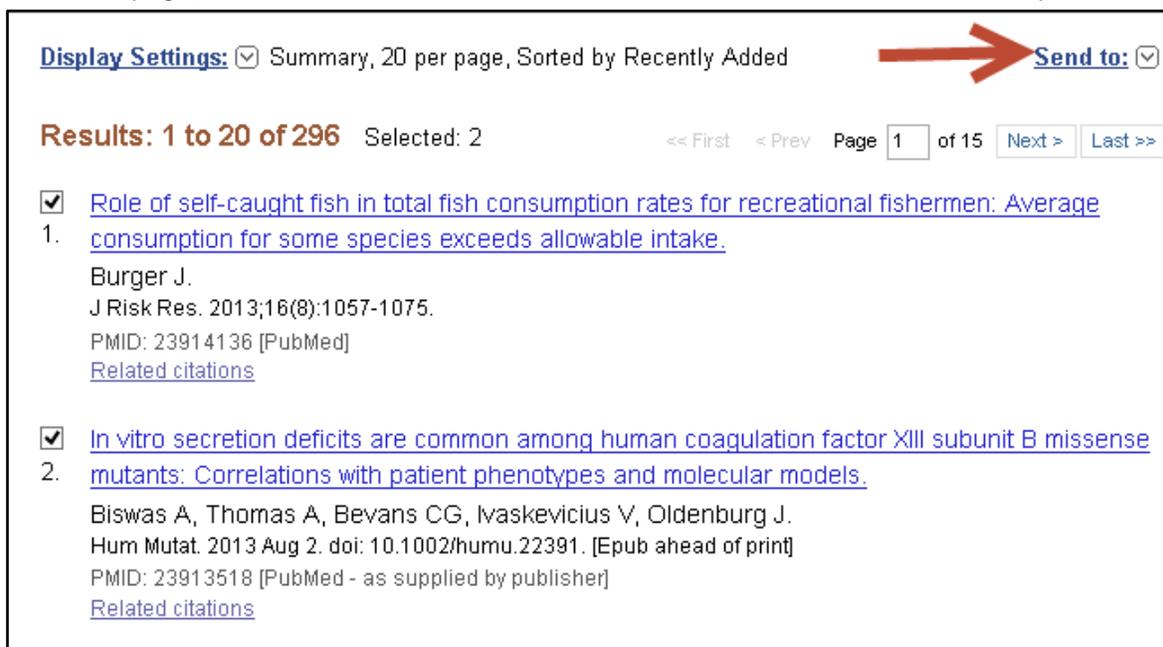
- Safari on Macintosh

Safari does not support direct export.

## 1.2 DIRECT EXPORT FROM PUBMED

### 1.2.1 Using the Clipboard

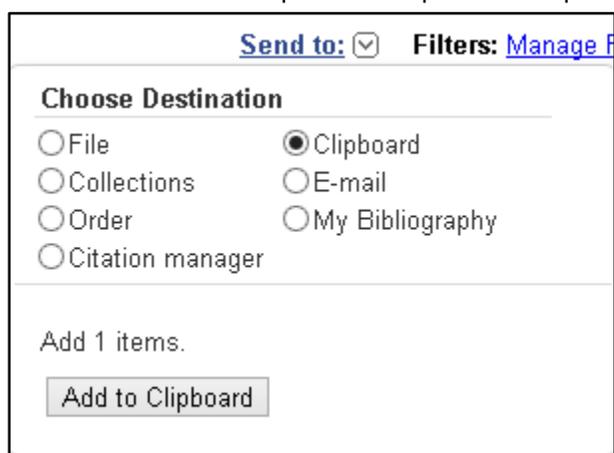
- Perform your search of PubMed and mark the references you would like to add to the Clipboard on each page, then click on the **Send to** link to send the selected references to the Clipboard.



The screenshot shows the PubMed search results interface. At the top, it says "Display Settings: [v] Summary, 20 per page, Sorted by Recently Added". To the right, there is a "Send to: [v]" link, which is highlighted with a red arrow. Below this, it says "Results: 1 to 20 of 296 Selected: 2". There are navigation buttons: "<< First", "< Prev", "Page 1 of 15", "Next >", and "Last >>". Two search results are listed, each with a checked checkbox:

- [Role of self-caught fish in total fish consumption rates for recreational fishermen: Average consumption for some species exceeds allowable intake.](#)  
Burger J.  
J Risk Res. 2013;16(8):1057-1075.  
PMID: 23914136 [PubMed]  
[Related citations](#)
- [In vitro secretion deficits are common among human coagulation factor XIII subunit B missense mutants: Correlations with patient phenotypes and molecular models.](#)  
Biswas A, Thomas A, Bevans CG, Ivaskевичius V, Oldenburg J.  
Hum Mutat. 2013 Aug 2. doi: 10.1002/humu.22391. [Epub ahead of print]  
PMID: 23913518 [PubMed - as supplied by publisher]  
[Related citations](#)

- In the window shown below, select the **Clipboard** option, then click the **Add to Clipboard** button to add the selected references to the Clipboard. You can continue adding references to the Clipboard. Up to 500 references can be kept on the Clipboard for up to eight hours without activity.



The screenshot shows the "Send to" dropdown menu. At the top, it says "Send to: [v] Filters: Manage F". Below this, there is a section titled "Choose Destination" with several radio button options:

- File
- Clipboard
- Collections
- E-mail
- Order
- My Bibliography
- Citation manager

Below the options, it says "Add 1 items." and there is a button labeled "Add to Clipboard".

- After adding items to the Clipboard, you will see a **Clipboard** link to the right of the **Send to** link, telling you how many items are in the Clipboard. When you have finished adding items to the Clipboard and are ready to send them to EndNote, click the **Clipboard items** link.

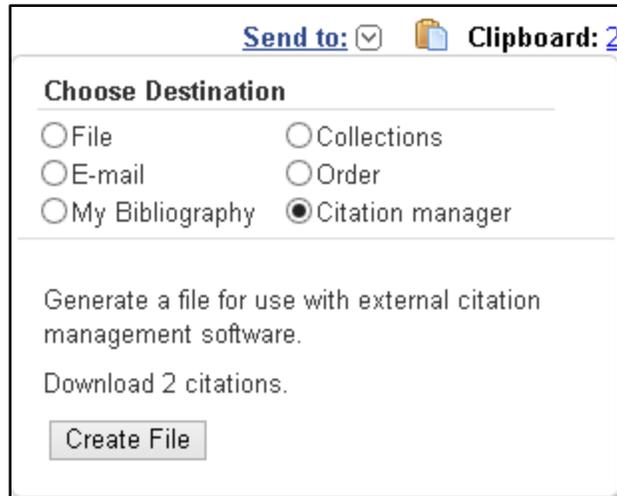


The screenshot shows the "Send to: [v]" link next to a "Clipboard: 2 items" link, which is accompanied by a small clipboard icon.

- In the Clipboard screen, click the **Send to** link, then select the **Citation Manager** option.



- Click the **Create File** button.



At this point your browser will need to send the file to EndNote. Different browsers will react differently at this point. Click on your browser below for instructions on how to proceed for your browser the first time you attempt direct export in that browser. Note that the file type shown will be different for different databases. For PubMed it will end with a .nbib extension.

- Firefox on Windows
- Firefox on Macintosh
- Internet Explorer on Windows
- Google Chrome on Windows
- Google Chrome on Macintosh

Chrome on the Macintosh does not support direct export.

- Safari on Macintosh

Safari does not support direct export.

## 1.2.2 Not Using the Clipboard

- Perform your search of PubMed. You can mark the references you would like to export on each page if you wish. If you do not mark any references, all the references in the found set can be exported, in batches of up to 200 at a time. Click on the **Send to** link to begin the export process.



**Display Settings:**  Summary, 20 per page, Sorted by Recently Added **Send to:**

1 item was added to the Clipboard.

**i** Clipboard items will be lost after eight hours of inactivity. The maximum number of Clipboard items is 500.

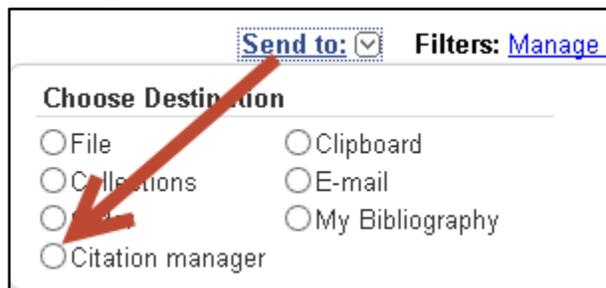
---

**Results: 1 to 20 of 296** << First < Prev Page 1 of 15 Next > Last >>

1. [Role of self-caught fish in total fish consumption rates for recreational fishermen: Average consumption for some species exceeds allowable intake.](#)

Burger J.  
J Risk Res. 2013;16(8):1057-1075.  
PMID: 23914136 [PubMed]  
[Related citations](#)

- Then select **Citation Manager**.



**Send to:**  **Filters:** [Manage f](#)

**Choose Destination**

File  Clipboard

Collections  E-mail

My Bibliography

Citation manager

- Select the number of references to export in the current batch, up to a maximum of 200 references.

The screenshot shows a web interface for exporting references. At the top, there are links for 'Send to: [dropdown]' and 'Filters: Manage F...'. Below this is a section titled 'Choose Destination' with several radio button options: File, Collections, Order, Citation manager (which is selected), Clipboard, E-mail, and My Bibliography. A text box below the options says 'Generate a file for use with external citation management software.' Underneath, there is a 'Number to send' dropdown menu currently set to 20, which is open to show options 5, 10, 20, 50, 100, and 200. A 'File' button is partially visible to the right of the dropdown.

- Keep track of the end number of the batch so you can repeat the export process for the next batch with the next consecutive record number. Then click the **Create File** button.

This screenshot shows the same 'Send to' dialog box as the previous one, but with the 'Number to send' dropdown menu closed and set to 20. A new text box labeled 'Start from citation' now contains the number 1. The 'Create File' button at the bottom of the dialog is now highlighted in grey, indicating it is the next step in the process.

At this point your browser will need to send the file to EndNote. Different browsers will react differently at this point. Click on your browser below for instructions on how to proceed for your browser the first time you attempt direct export in that browser. Note that the file type shown will be different for different databases. For PubMed it will end with a .nbib extension.

- Firefox on Windows
- Firefox on Macintosh
- Internet Explorer on Windows
- Google Chrome on Windows
- Google Chrome on Macintosh

Chrome on the Macintosh does not support direct export.

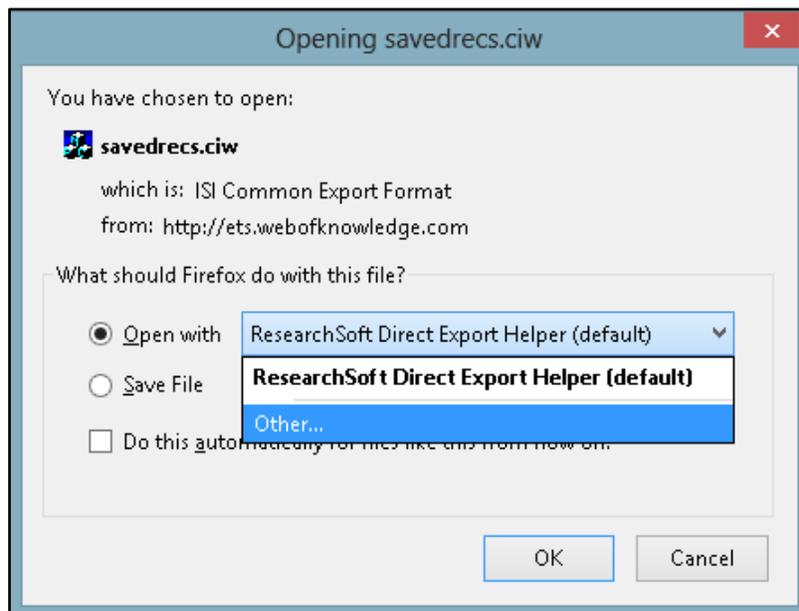
- Safari on Macintosh

Safari does not support direct export.

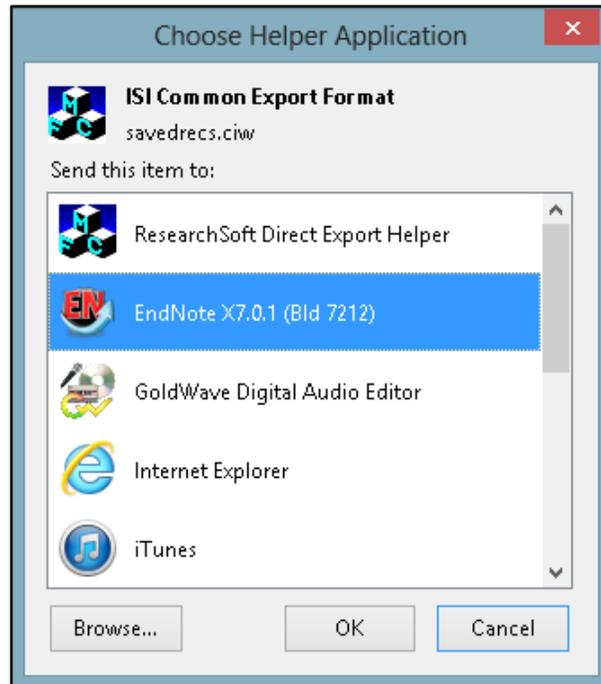
## 1.3 BROWSER ACTIONS WITH DIRECT EXPORT

### 1.3.1 Firefox on Windows

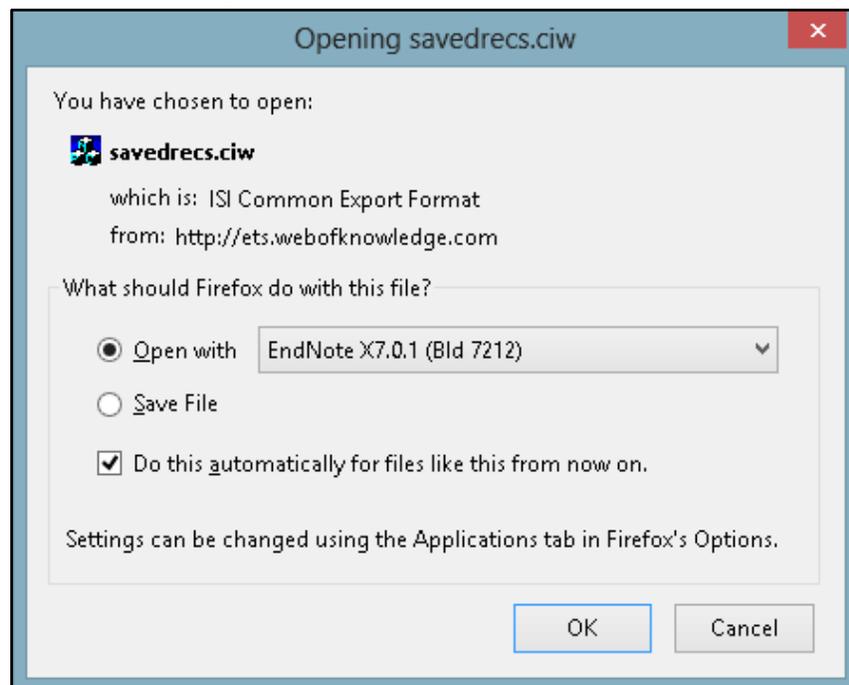
- Firefox will bring up a window like the one below the first time a new export file type attempts to download. To have the file open in EndNote so the references will be imported, you can select the **ResearchSoft Direct Export Helper** if you see it shown as the default, or you can click on the drop-down list and select the **Other** option as shown.



- This should bring up a window like the one below. Select **EndNote** from this list (your version may vary from the version shown here). Then click on the **OK** button.



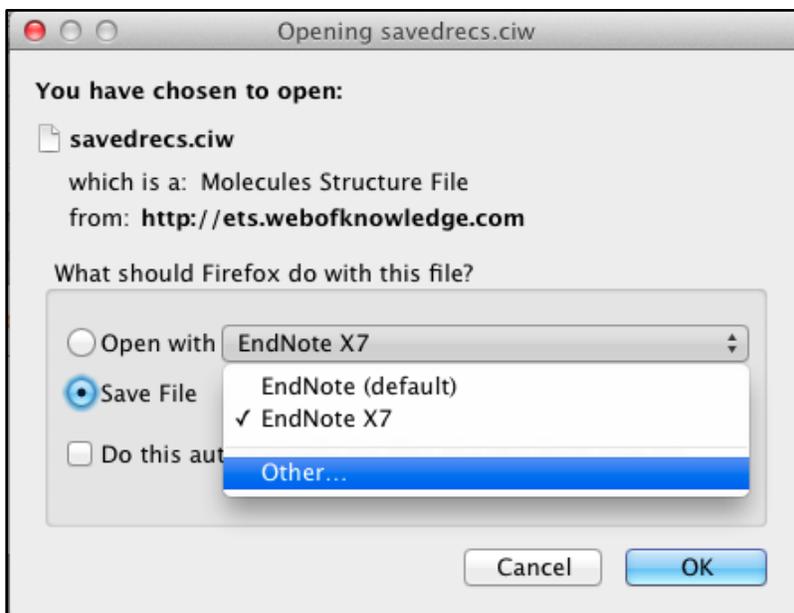
- When returned to the window below, you may select the option to **Do this automatically for files like this from now on**. Please note there are several different file types that work with direct export, and you will need to go through this process for each of these file types (.ciw, .ris, .ovd, .enw, .nbib).



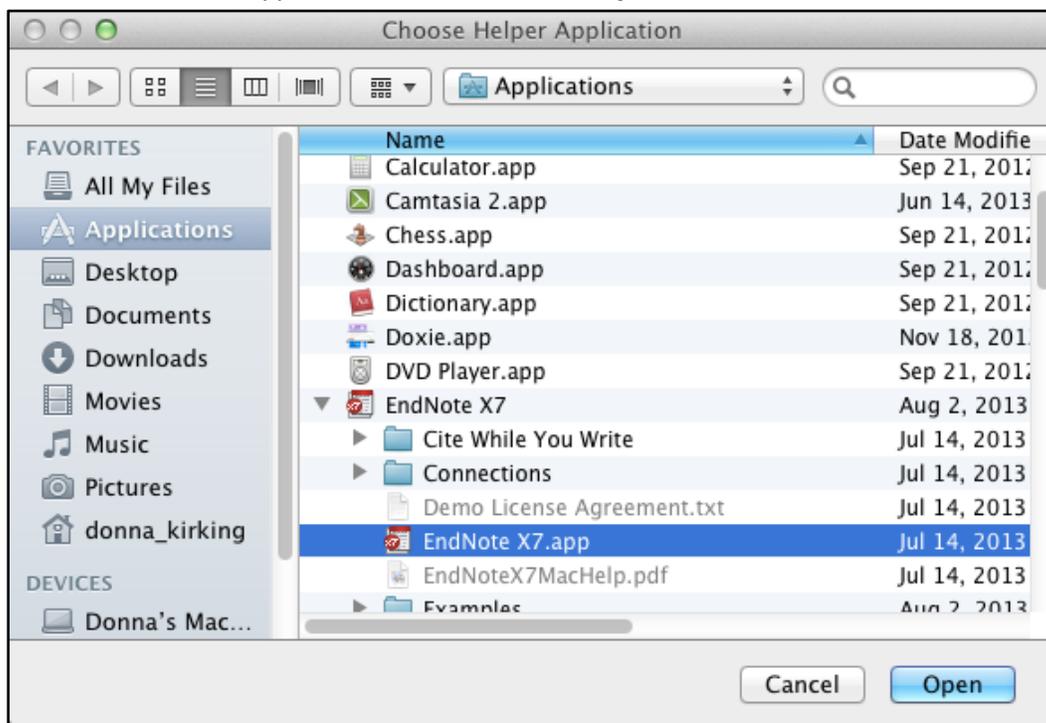
- Click the **OK** button to finish the import into EndNote.

### 1.3.2 Firefox on Macintosh

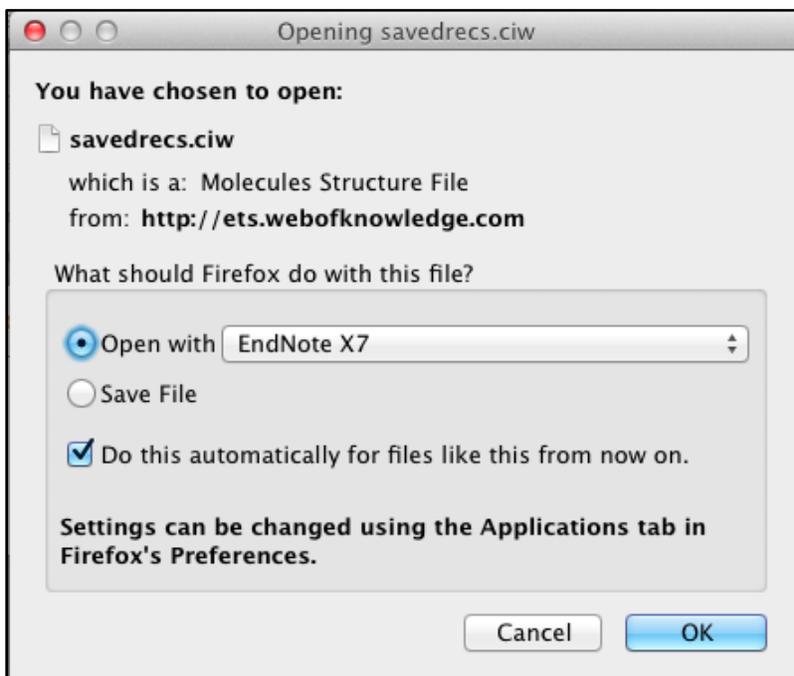
- Firefox will bring up a window like the one below the first time a new export file type attempts to download. To have the file open in EndNote so the references will be imported, click on the drop-down list and select the **Other** option as shown.



- This should bring up a window like the one below. Navigate to the *Applications/EndNote* folder and select the **EndNote** application. Then click on the **Open** button.



- When returned to the window below, you may select the option to **Do this automatically for files like this from now on**. Please note there are several different files types that work with direct export, and you will need to go through this process for each of these file types (.ciw, .ris, .ovd, .enw, .nbib).



- Click the **OK** button to finish the import into EndNote.

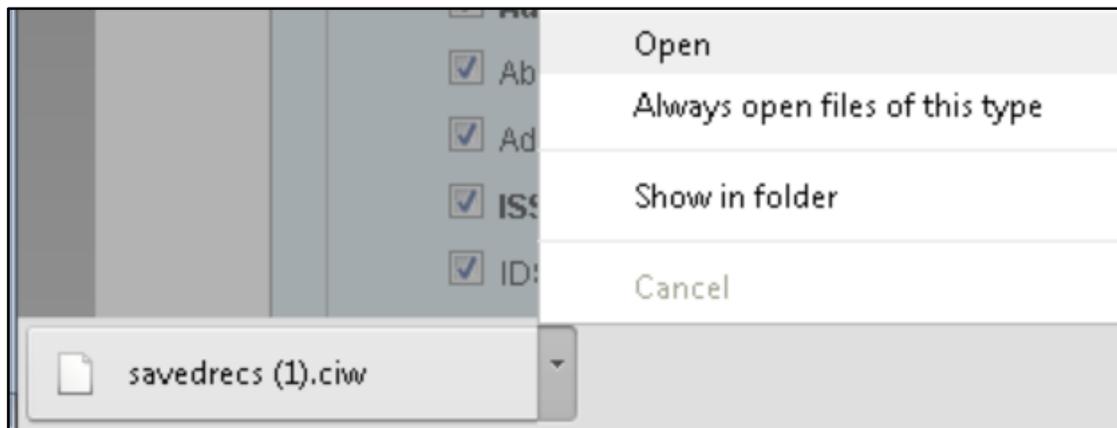
### 1.3.3 Internet Explorer on Windows

- You will see a message like the one below near the bottom of your Internet Explorer window, asking if you want to open the file, save it, or cancel. Click the **Open** button and the references should be imported to EndNote.

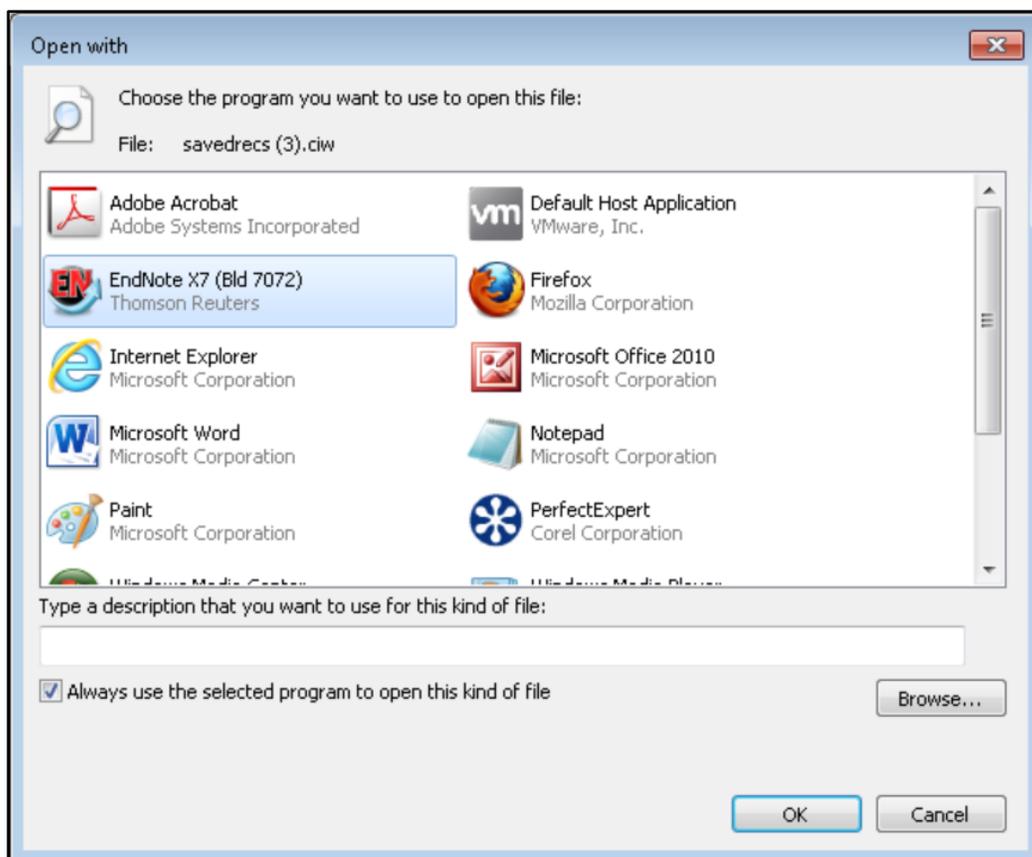


### 1.3.4 Google Chrome on Windows

- Upon selecting the option to export from the online database, you will see the items below in the bottom left corner of the Chrome window. Select the option to **Open**. (Note that you can also select the option to **Always open files of this type** if you are absolutely sure you always want it to open those files in EndNote in the future.)



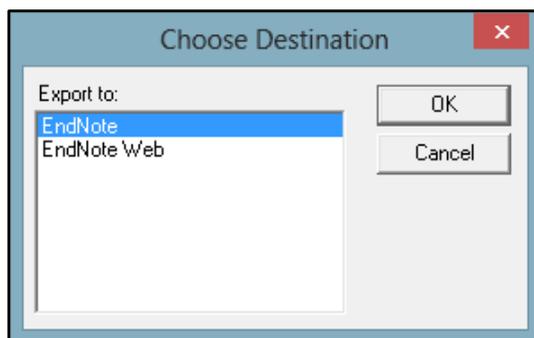
- You will then see a window similar to this, showing you a list of possible programs for opening the file. Select **EndNote** from the list, then click the **OK** button.



## 1.4 ENDNOTE ONLINE PLUG-INS FOR DIRECT EXPORT

### 1.4.1 Internet Explorer

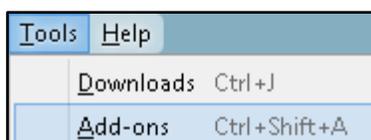
- If you have installed the EndNote online plug-in for Internet Explorer, you will see a window like the one below when you use direct export. Select EndNote if you want the search results sent to your EndNote desktop library. Select EndNote Web if you want the search results sent to your EndNote online library.



### 1.4.2 Firefox

If you have installed the EndNote online extension for Firefox, you will need to set the extension options/preferences to direct search results to either EndNote desktop or EndNote online. The screenshots below are from Windows, but the instructions are the same on Macintosh, except as stated below.

- Select **Add-ons** from the **Tools** menu whenever you want to switch between sending references to either EndNote desktop or EndNote online.



- Select the **Extensions** option at the left side of the window, then the **EndNote** extension, then click the **Options** button on Windows or the **Preferences** button on Macintosh.



- Mark the box labeled **Redirect the following MIME types for direct export files to open with EndNote:** if you want the results to be sent to **EndNote online**. Unmark the same box if you want to be able to send the results to **EndNote desktop** as described earlier in this chapter.



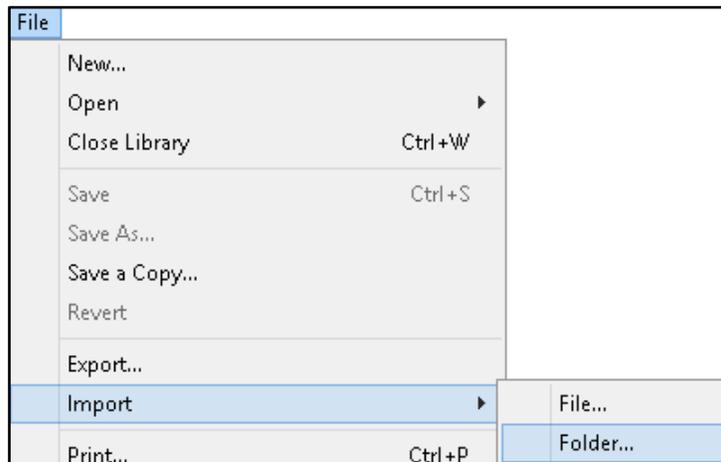
## 2 IMPORTING PDF FILES AND PDF HANDLING

### 2.1 IMPORTING PDF FILES

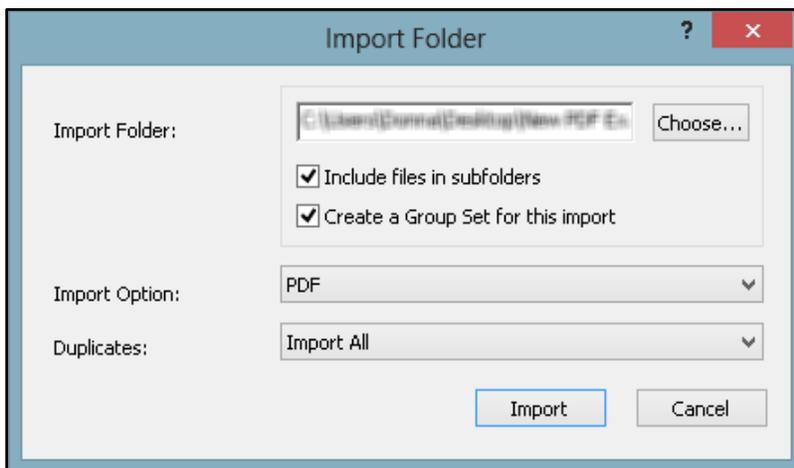
EndNote can import PDF files containing a Digital Object Identifier (DOI) in the metadata or the first two pages of the PDF. EndNote sends the DOI to PubMed and CrossRef, online databases capable of looking up reference data by DOI. The online databases send back the bibliographic information, EndNote imports it, then attaches the PDF to the record created. This means the PDF must have a DOI and EndNote must have access to the Internet during the import.

#### 2.1.1 Importing a Folder of PDF Files on Windows

- Select **Import** from the **File** menu, then select **Folder**.



- Click the **Choose** button, navigate to the folder you want to import, and double-click on it. It will appear in the *Import Folder:* field. If you wish to include subfolders within that folder, mark the box labeled **Include files in subfolders**. If you want EndNote to create a separate group set for the main folder and groups within it for the subfolders, mark the box labeled **Create a Group Set for this import**. Leave the other settings at their defaults. (Note that in EndNote X7, EndNote will attempt to attach PDFs to matching records that already exist in the library instead of creating duplicate records.) When all your options are set, click the **Import** button.

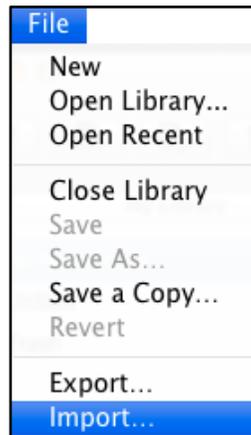


- The PDF files are imported. Below you see an example of the group set and groups that would be created for a folder called *New PDF Examples* that contained a folder called *Bats* and a folder called *Birds*.

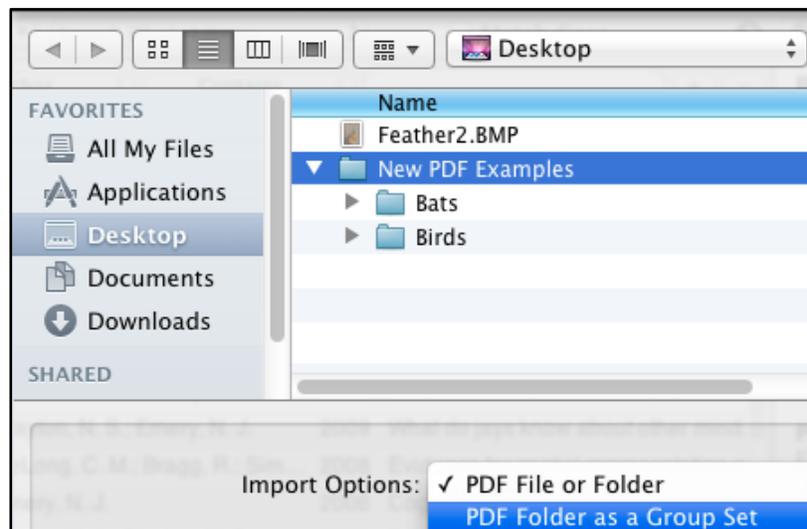


## 2.1.2 Importing a Folder of PDF Files on Macintosh

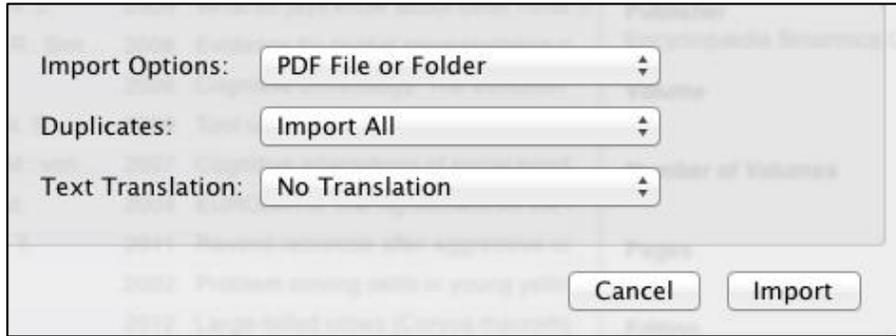
- Select **Import** from the **File** menu.



- Select **PDF File or Folder** if you do not want EndNote to create a group set and groups for the imported PDFs, or if you are only importing a single PDF. Select **PDF Folder as a Group Set** if you want EndNote to create a group set and groups for the imported PDFs. (Note: The rest of this example will show the group set option.)



- Leave the other options at the default settings and click the **Import** button. (Note that in EndNote X7, EndNote will attempt to attach PDFs to matching records that already exist in the library instead of creating duplicate records.)

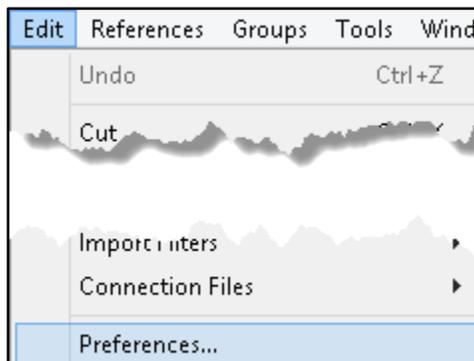


EndNote will import the PDFs and create the group set and groups. (Example not shown.)

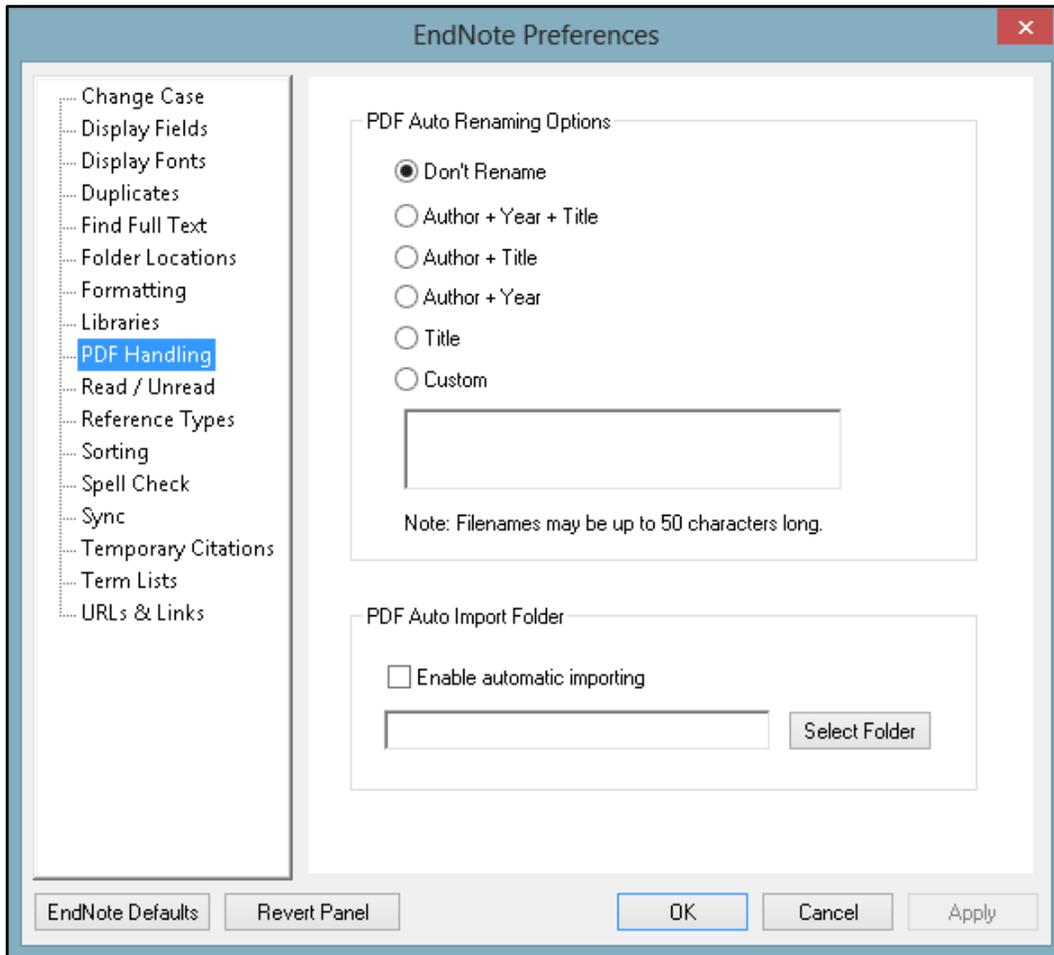
## 2.2 SETTING PDF HANDLING PREFERENCES

### 2.2.1 Windows

- Select **Preferences** from the **Edit** menu to open the EndNote preferences panel.

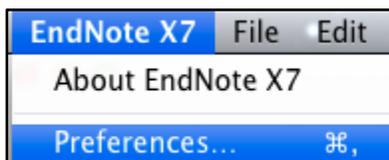


- Click the **PDF Handling** option in the preferences panel to see the window below. Here you can set automatic renaming options for PDFs you import or set a “watched” automatic importing folder. Any PDF added to the automatic importing folder will be imported into the EndNote library. Click the **OK** button when you have finished selecting your options. (Note: A folder within the automatic importing folder will be created to hold PDFs after they have been imported, so you can easily tell which files have already been imported and which have not yet been imported.)

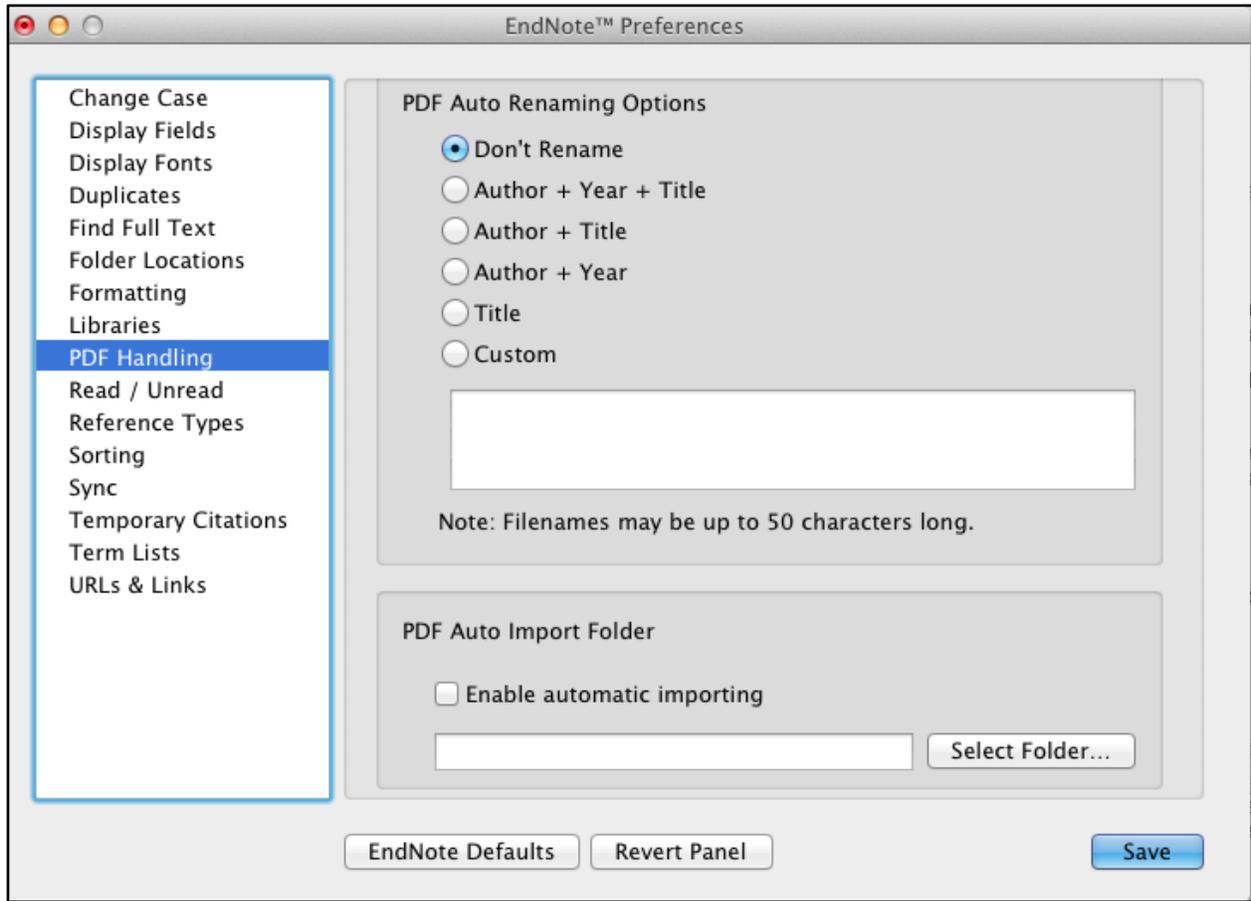


## 2.2.2 Macintosh

- Select **Preferences** from the **EndNote X7** menu to open the EndNote preferences panel.



- Click the **PDF Handling** option in the preferences panel to see the window below. Here you can set automatic renaming options for PDFs you import or set a “watched” automatic importing folder. Any PDF added to the automatic importing folder will be imported into the EndNote library. Click the **Save** button when you have finished selecting your options, then close the window. (Note: A folder within the automatic importing folder will be created to hold PDFs after they have been imported, so you can easily tell which files have already been imported and which have not yet been imported.)



## 3 CONVERTING FROM OTHER REFERENCING SOFTWARE

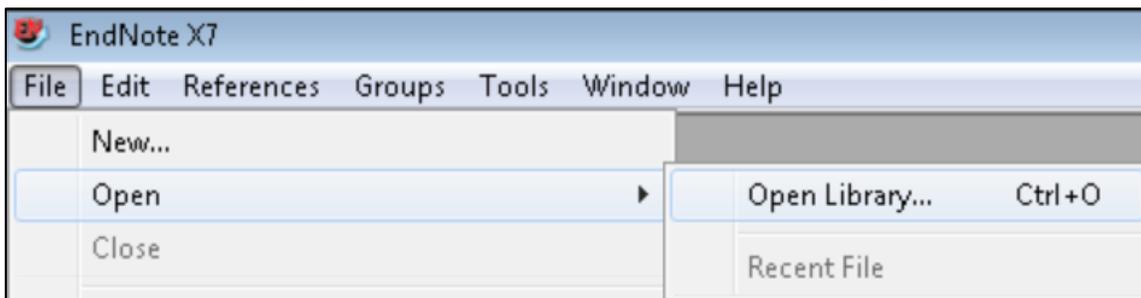
### 3.1 CONVERTING FROM REFERENCE MANAGER TO ENDNOTE

Converting a Reference Manager database to an EndNote library is not difficult and requires no importing or exporting of text files. If you have customized your Reference Manager reference types and fields, you can even customize the mapping of those reference types and fields during the conversion process.

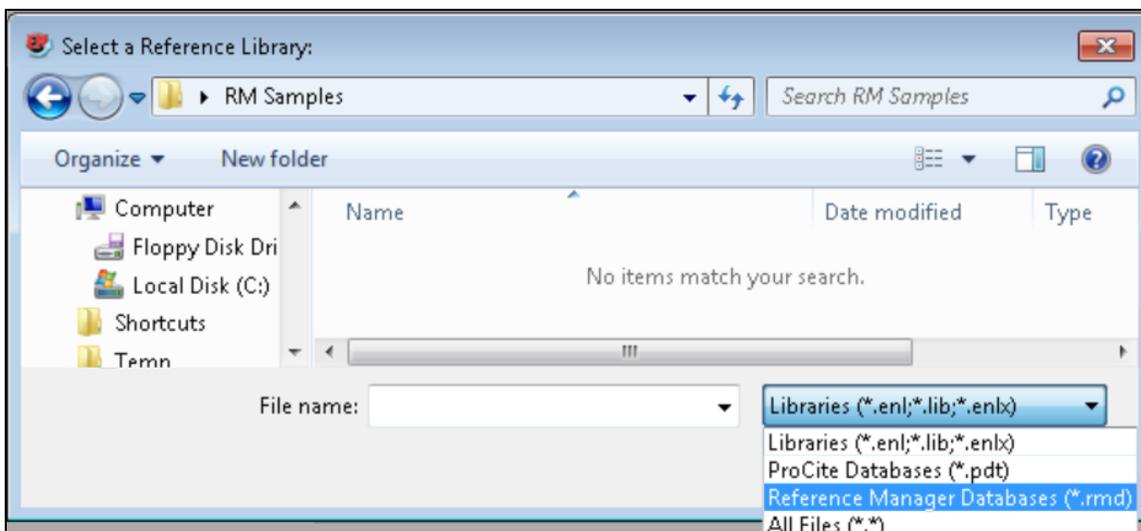
Note that the conversion process will make no changes to the original Reference Manager database.

#### 3.1.1 Converting the Reference Manager Database

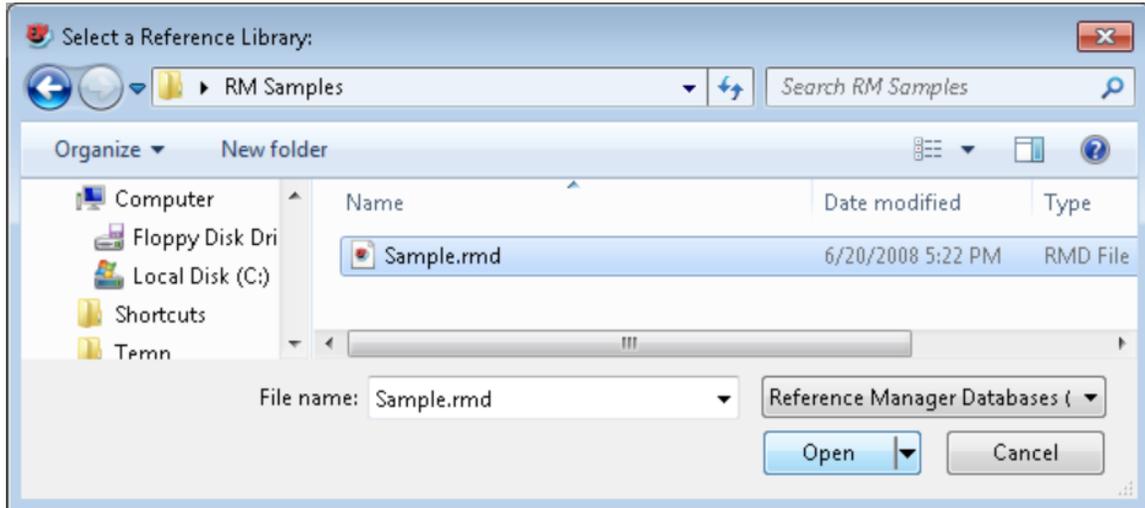
- In EndNote, select **Open** from the **File** menu, then select **Open Library**.



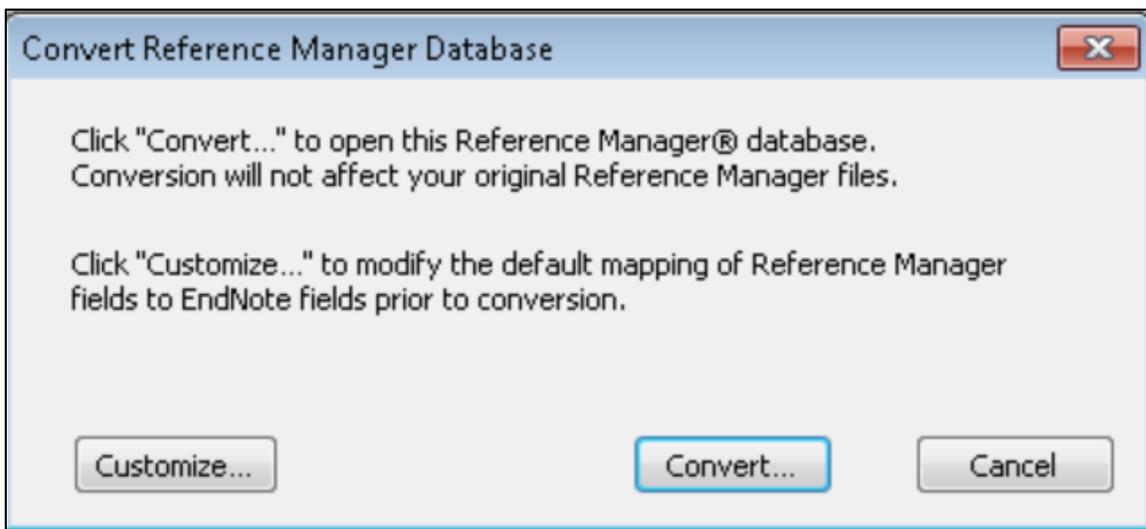
- In the *Select a Reference Library* window, navigate to the folder containing your Reference Manager database and select the **Reference Manager Databases (\*.rmd)** option from the drop-down list of file types.



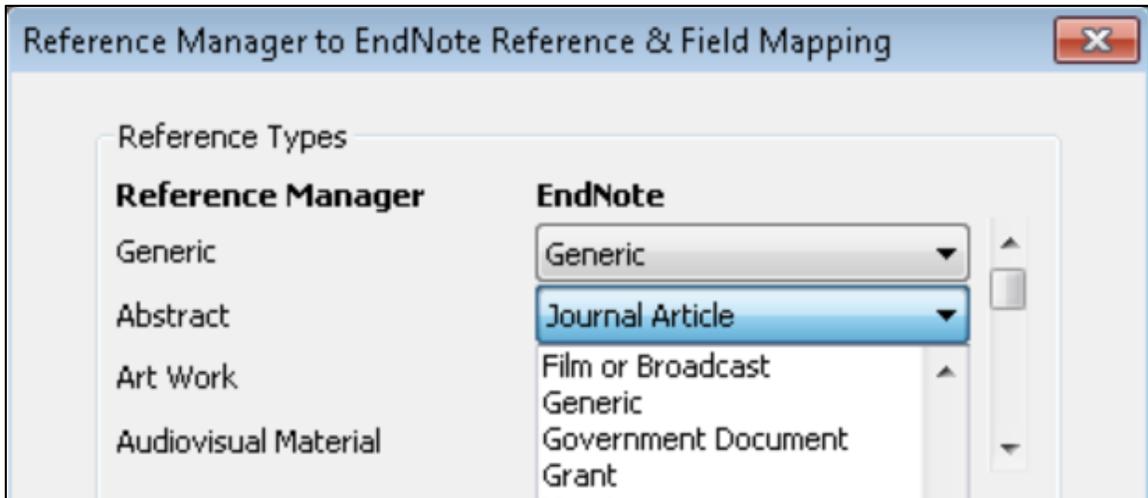
- You will now see the Reference Manager database in the folder. Select it, then click on the **Open** button.



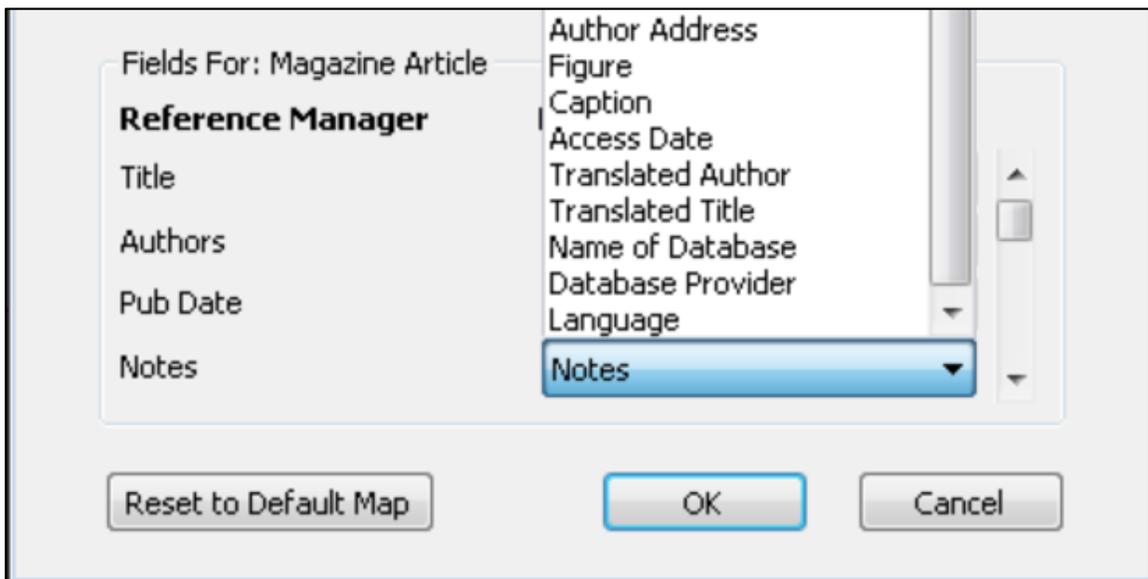
- If you have not customized any of your reference types or fields in Reference Manager, you can simply click the **Convert** button to convert the database. If you have customized your database, click the **Customize** button to customize the field mappings. ([Click here to continue with the uncustomized conversion instructions.](#))



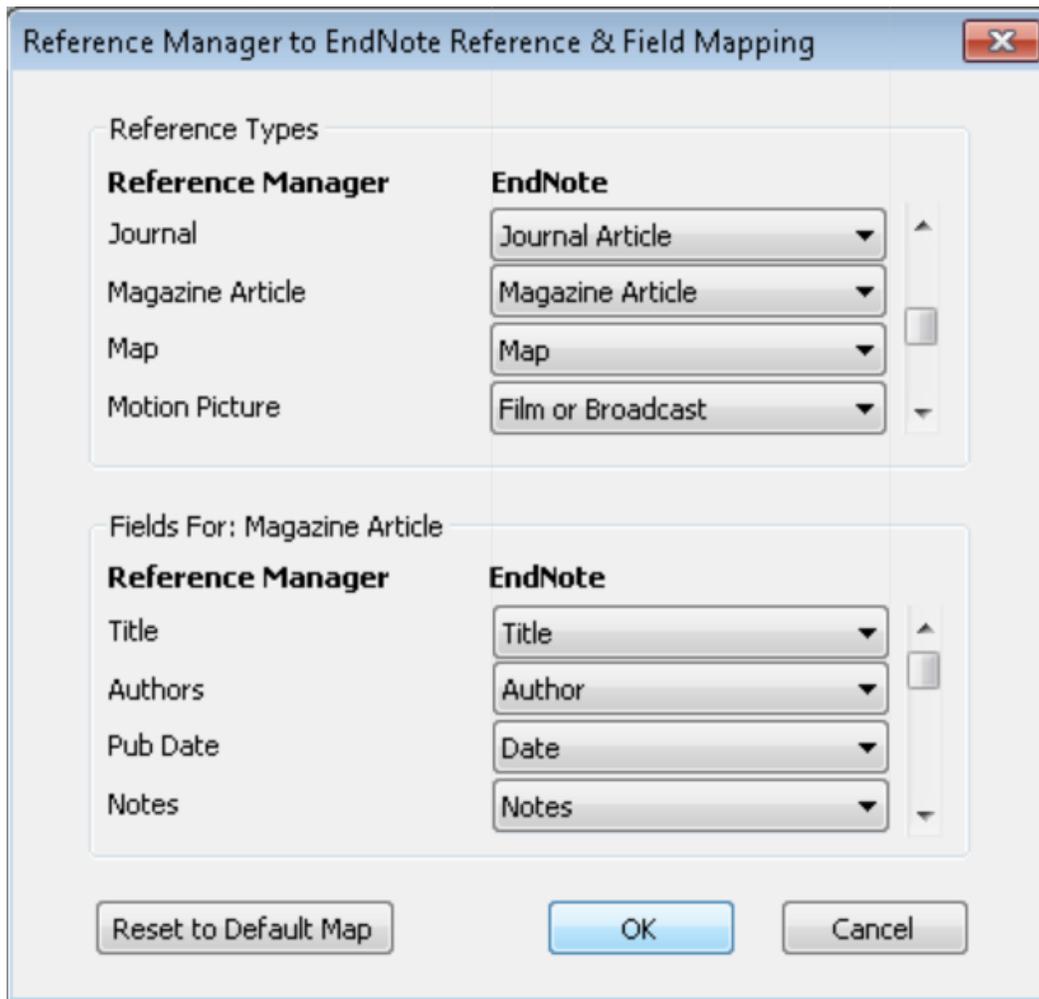
- If you have selected to customize your conversion, in the top half of the field mapping window you can select the EndNote reference type that each Reference Manager reference type will import as. For example, in the screen shot below it shows that any reference that was entered as an abstract in Reference Manager will be imported as a journal article in EndNote. You can change these options if you wish using the drop-down list for each match in the EndNote column.



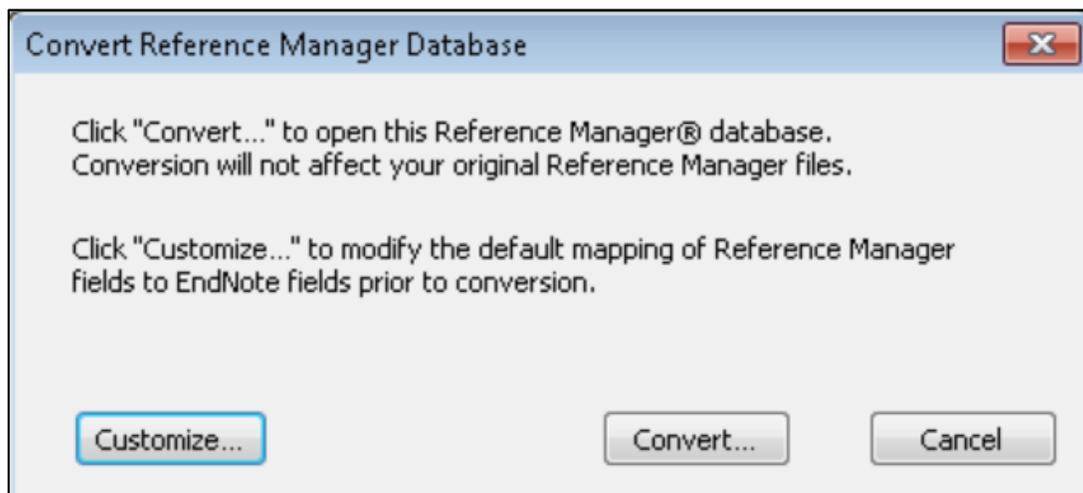
- In the bottom part of this window you can select the specific fields in EndNote that each Reference Manager field will map to for the shown Reference type. In the screenshot below, the Notes field for the Magazine Article reference type in Reference Manager is being mapped to the Notes field in EndNote.



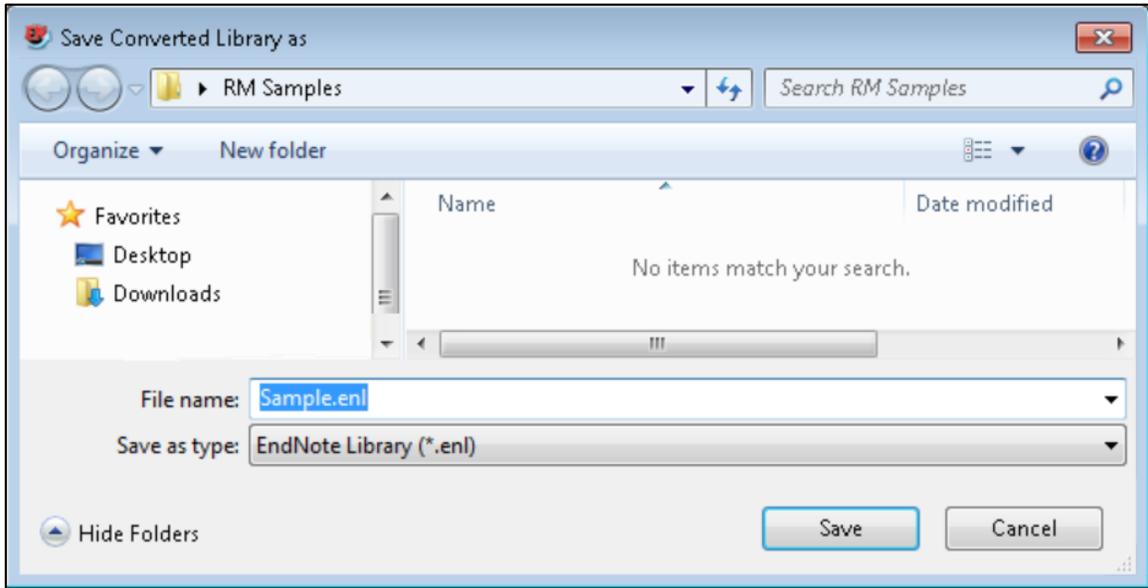
- When all reference types and fields are mapped as you wish, click the **OK** button to finalize the field and reference type customizations.



- Then click the **Convert** button to convert the database.

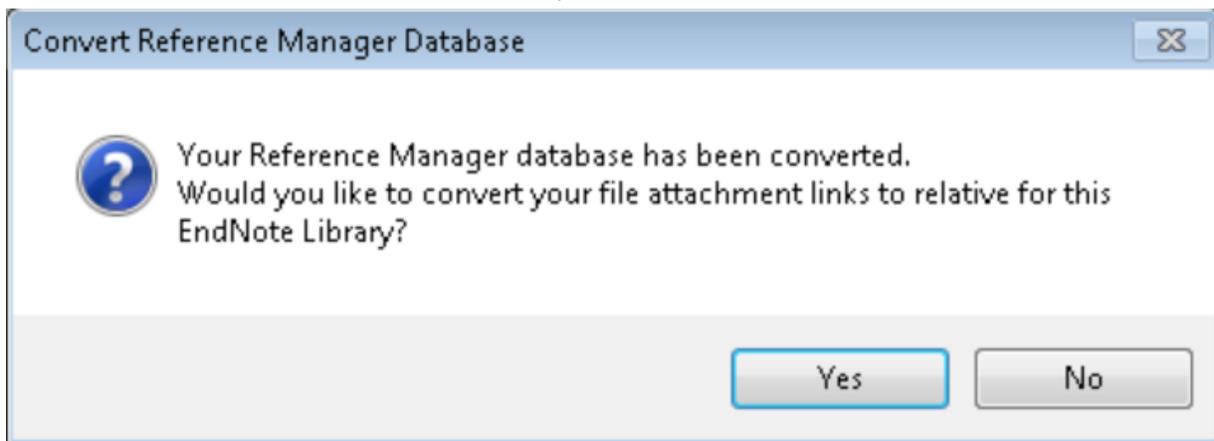


- Give your new EndNote library a name. We suggest saving the new library in your main documents folder. Never save an EndNote library in an online service such as Dropbox, SkyDrive, Google Drive, SharePoint, or similar online (“cloud”) storage. These services will corrupt an EndNote library. Similarly, do not put your library on a distant network server because the Internet lag times in communicating with a distant server can corrupt an EndNote library. It is best to store your library on your computer’s hard drive. Click the **Save** button to save your new EndNote library.

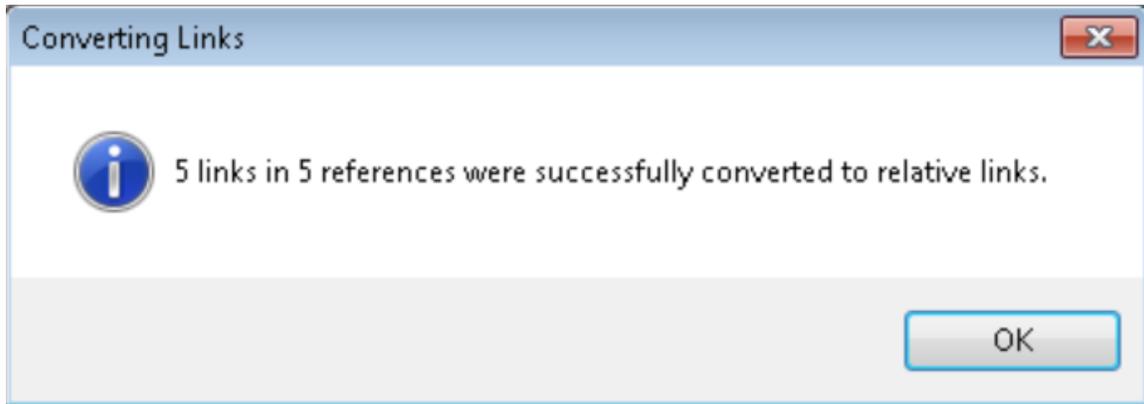


### 3.1.2 Converting Reference Manager Attachments to EndNote Attachments

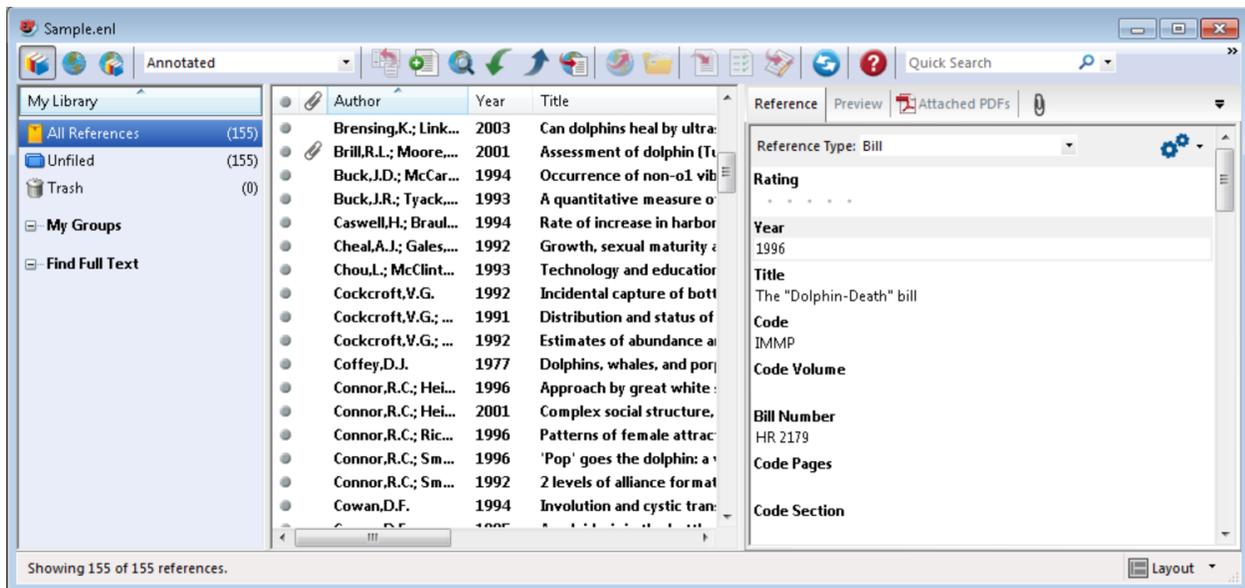
- If there were Reference Manager attachments in your database, EndNote will show the screen below, asking if you would like to convert them to relative links (attachments) in the EndNote library. This will copy the attachment files to the .data folder of the EndNote library and create links between the attachments and the matching records in the library. Click the **Yes** button to convert attachments. If you choose not to convert attachments, links to the original attachments will remain, but if you move your library to a new computer those links may be broken if the same directory structure does not exist on the new computer.



- You will receive a message of how many links have been converted. Click the **OK** button.

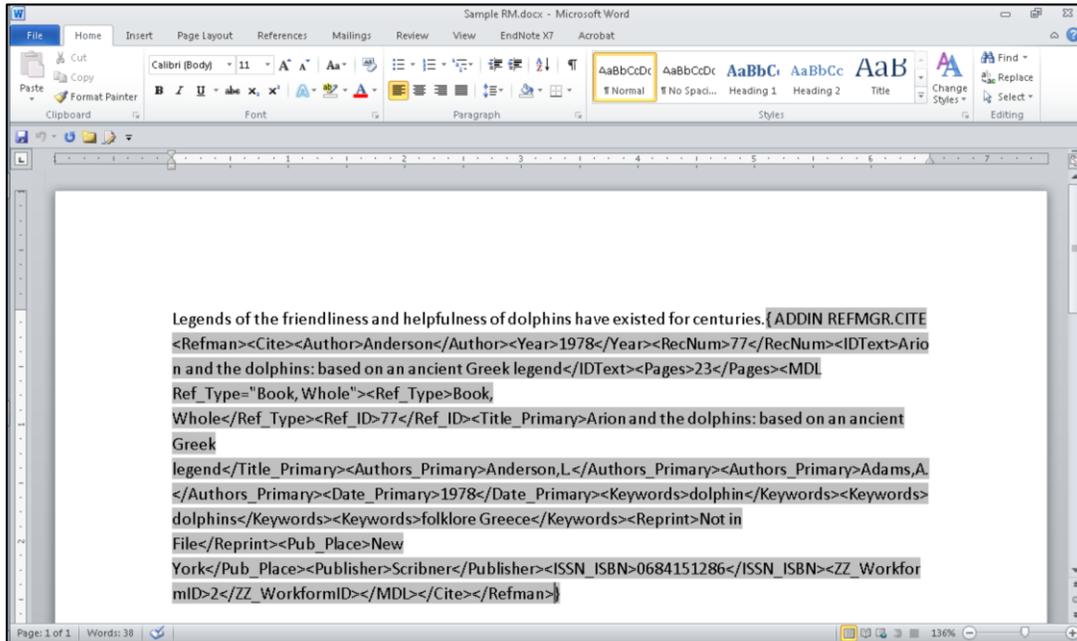


- Your new EndNote library will be displayed. The paperclip icon below shows there is something in the File Attachments field of the Brill 2001 record.

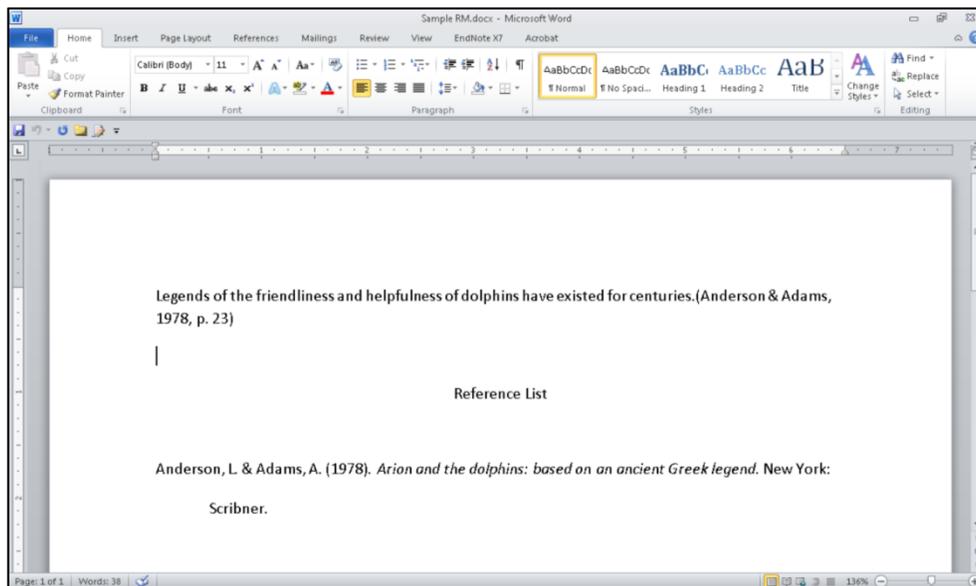


### 3.1.3 Converting Word Documents with Reference Manager Citations

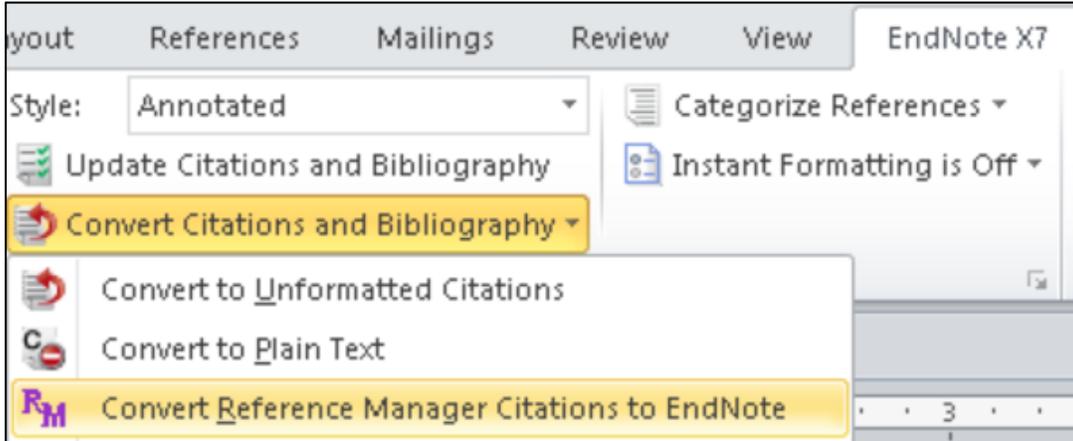
- Although you normally would not see the codes shown here, what you see below is an example of the actual coding that is inserted into your documents when you use Reference Manager's Cite While You Write in Word. The code starts with the text "ADDIN REFMGR.CITE" because this citation came from Reference Manager. These Reference Manager codes need to be converted to EndNote codes if you want to continue working with them using EndNote. (The field codes are shown by using the Toggle Field Codes command in Word. You do not need to do this to convert the citations.)



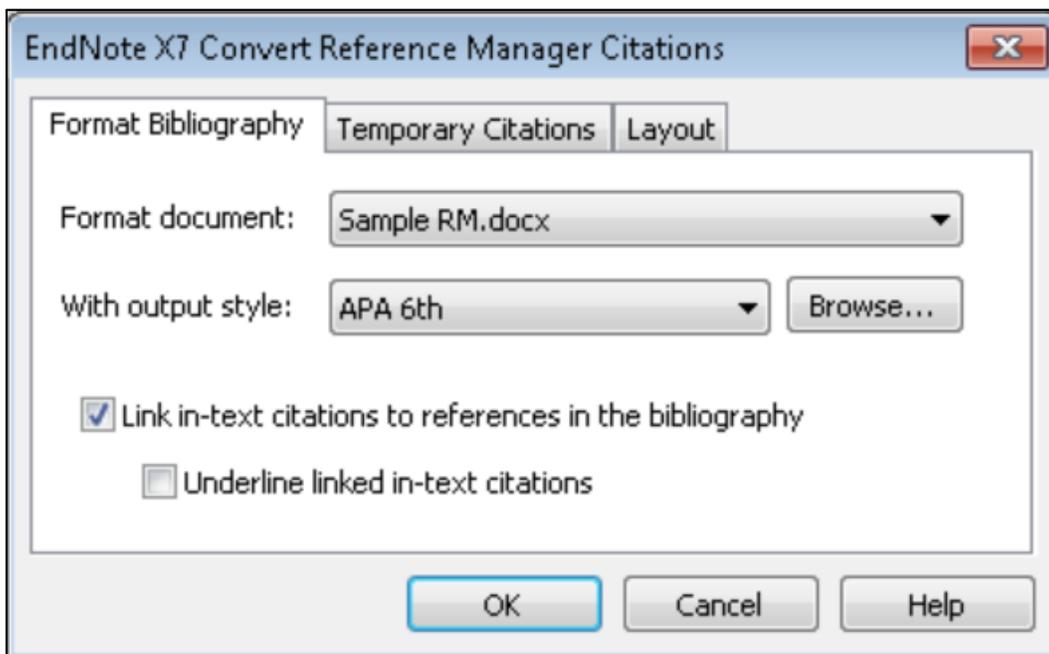
- The screenshot below is what you would normally see with your old Reference Manager citations in it. The codes are shown above just to give you an idea of what is really there. In this window you would first click on the EndNote tab on the ribbon, shown before the Acrobat tab below. The EndNote library you converted from Reference Manager will need to be open in EndNote to convert the codes.



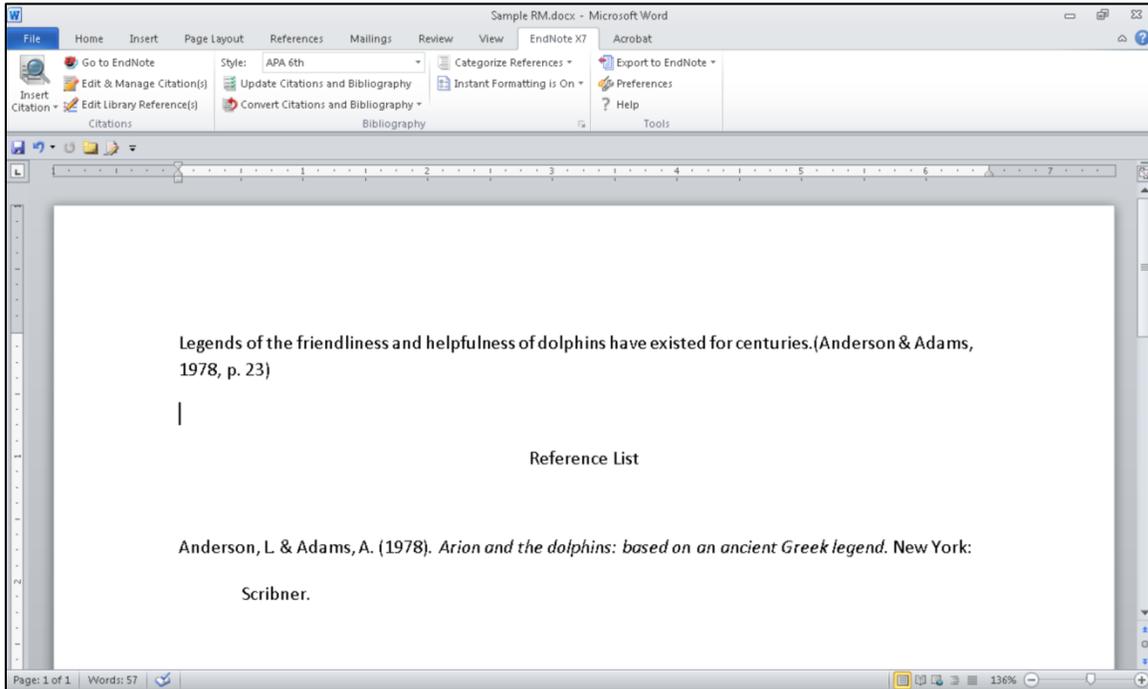
- Select **Convert Reference Manager Citations to EndNote** from the drop-down **Convert Citations and Bibliography** list in the *Bibliography* group.



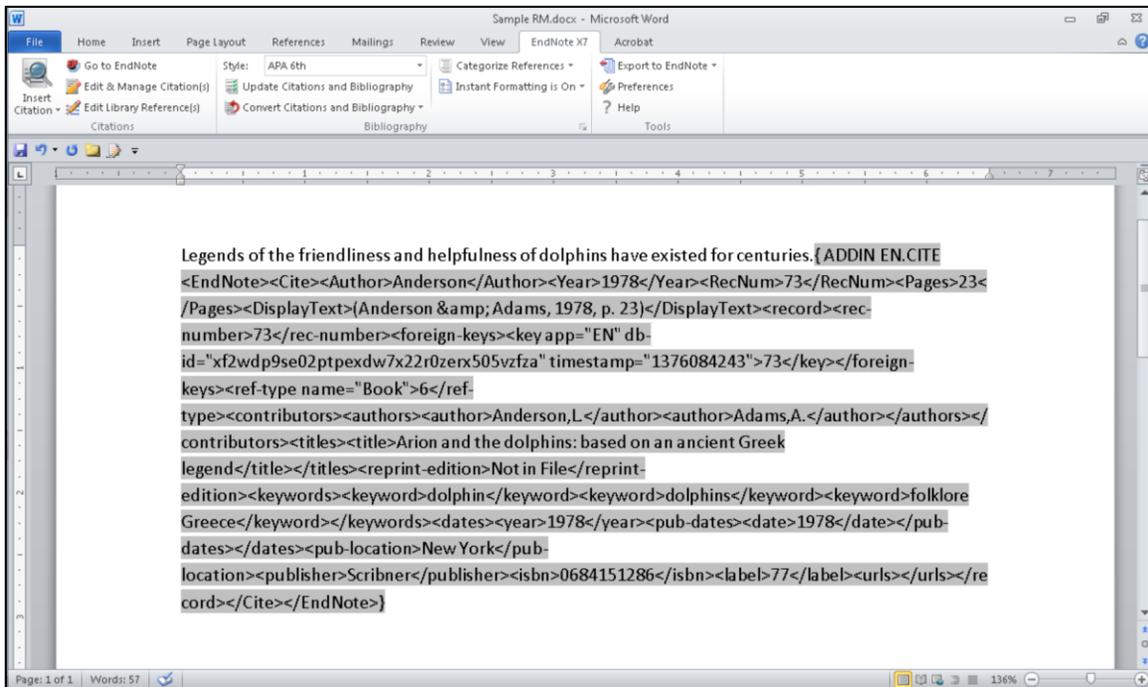
- EndNote will display the screen below, where you can select a style and set layout options much as you can in the Configure Bibliography window in EndNote. Set your options, then click on the **OK** button.



- The bibliography and citations look the same at first glance, but they are now EndNote citations and bibliography instead of Reference Manager. Note that in my example even the page number in the citation was converted.



- If you looked at the field codes in Word now, you would see the code begins with "ADDIN EN.CITE," showing that it is now an EndNote citation.



## 4 CITE WHILE YOU WRITE

EndNote's Cite While You Write (CWYW) lets you look up references, insert them in your document, format your bibliography, and edit your citations to include page numbers or other text, all from within your word-processing document. Below are instructions for using Cite While You Write with Microsoft Word.

### 4.1 CITE WHILE YOU WRITE IN MICROSOFT WORD ON WINDOWS

#### 4.1.1 Installing the Cite While You Write Tools

When you install EndNote it will automatically install files into a common program folder, allowing EndNote and Word to communicate and enabling Cite While You Write (CWYW). In Word 2007, 2010, or 2013 you will see a tab on the ribbon, similar to that shown below. (Note: It is best to close all other programs before installing EndNote, most especially Word and Outlook. When installing Word and EndNote on a new computer, always install Word first to enable EndNote to find it and be able to install the Cite While You Write tools.)



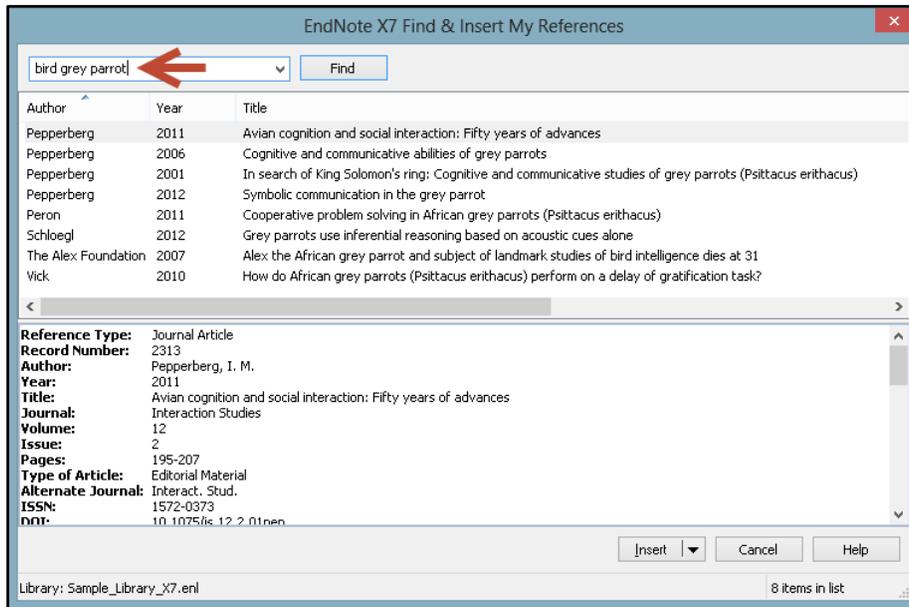
Below is information on using the Cite While You Write tools that you will need on a day-to-day basis.

#### 4.1.2 Adding Citations to a Document Using Insert Citation

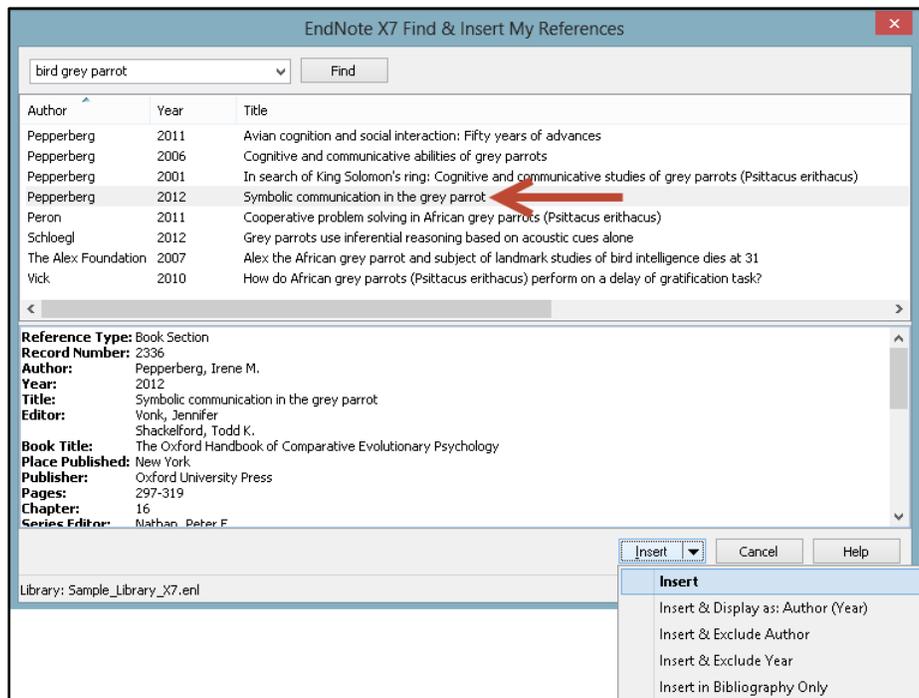
- Click the magnifying glass in the top half of the **Insert Citation** button on the EndNote tab in Word to open the *Find & Insert My References* window.



- In the *Find & Insert My References* window that appears, enter your search terms and click the **Find** button, or press the **Enter/Return** key, to bring up a set of references that contain those search terms. The terms can be anywhere in the EndNote record, but all the terms must be present in the same record.



- Next, select (highlight) the reference(s) you want to insert. When you select a single reference, you will see the details for that reference in the bottom part of the window, but details can be shown for only a single reference. However, you can select multiple references for insertion by holding down the **Control** key and clicking on them, then selecting your insertion options from the **Insert** list.



Your references will be inserted in the document and instantly formatted.

### 4.1.3 Adding Citations to a Document Using Insert Selected Citations

- To select the citations you will insert in the document, return to EndNote by clicking the **Go to EndNote** button.



- In EndNote, select (highlight) the references you want to insert. You have two choices for how you insert them in the document.

- You can insert them in the document from EndNote using the first button of the set shown below, **Insert Citation**. (Note this is a different command than the *Insert Citation* button within Word, being the equivalent of the *Insert Selected Citation(s)* command in Word.) This will insert the references wherever your cursor is located in Word.



- If you would like to check if your cursor is in the correct location and then insert the references from within Word, in EndNote click on the third button shown in the set below, **Return to Word Processor**.



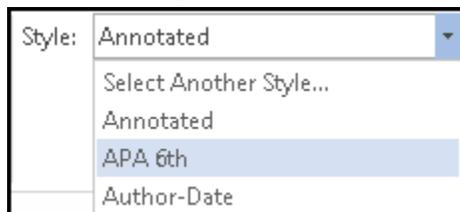
- If you returned to Word to insert the selected citations, click the bottom part of the **Insert Citation** button, then select **Insert Selected Citation(s)** from the drop-down list.



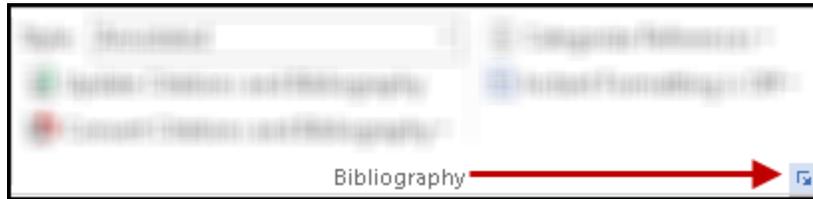
Your references will be inserted in the document and instantly formatted.

### 4.1.4 Selecting the EndNote Style for Your Citations and Bibliography

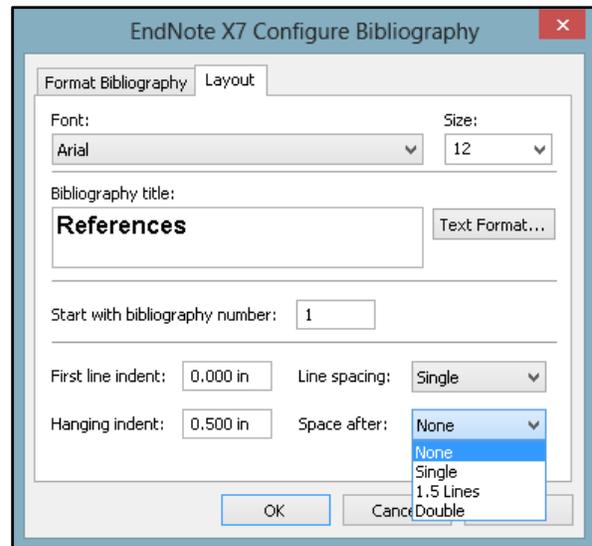
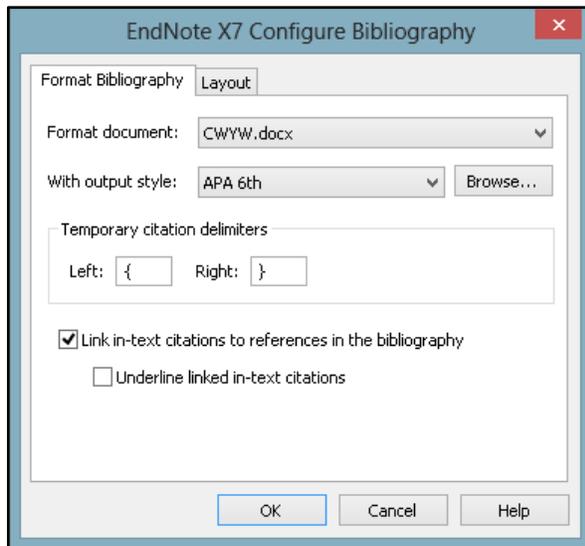
- You can select your preferred style from the drop-down style list as shown below, or select the **Select Another Style** option to see the list of EndNote styles available on your computer. (Note that a typical installation of EndNote only installs a list of popular styles. You can perform a custom installation of EndNote to install more styles or download them from the EndNote web site.)



- If you would like more control over the formatting of the citations and bibliography, such as the ability to change the line spacing or set hyperlinking options between the citations and bibliography, click the **small arrow in the bottom right corner of the Bibliography group** to open the *Configure Bibliography* window.



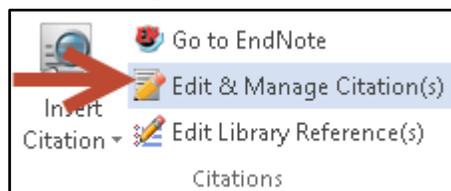
- The two tabs in the *Configure Bibliography* window provide options for changing the style, adding, removing, or formatting hyperlinks between citations and their matches in the bibliography, adding a centered title above the bibliography, changing the font used for the bibliography, and more. Select your options, then click the **OK** button to make your changes. Changing these options using Word commands would not effect permanent changes; you must use the *Configure Bibliography* command to permanently change options such as font or line spacing in the bibliography.



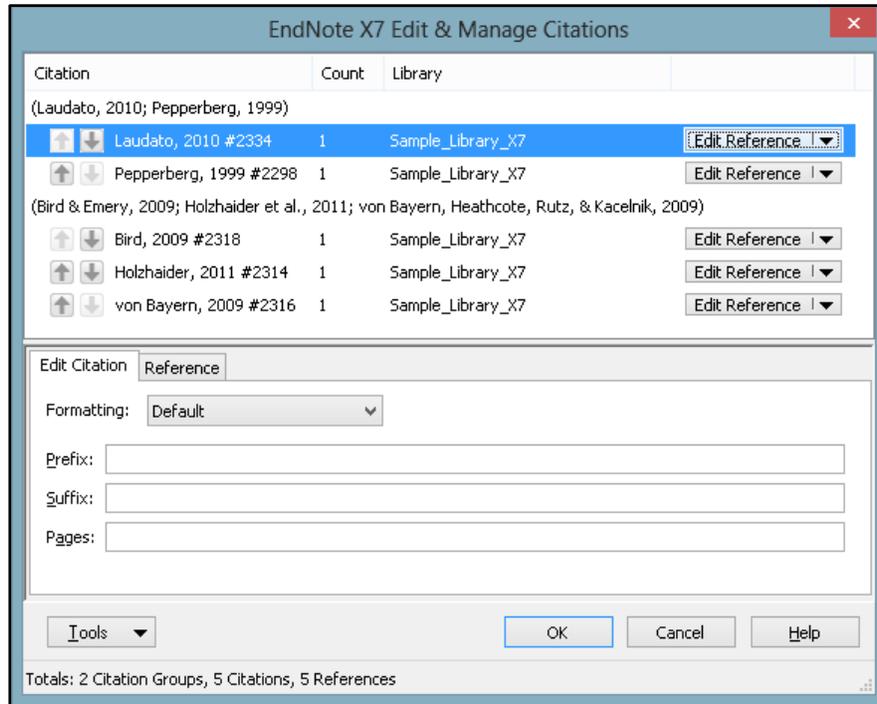
#### 4.1.5 Editing Citations in the Document

If you try to edit citations in a document by simply typing the page numbers into a citation or removing an author's name from a citation, the change will only be temporary and will disappear with the next update of the bibliography. Worse than that, you risk corrupting the citation codes, which would prevent EndNote from updating them and could cause other problems in your document. The only safe way to make changes to the citations is using the *Edit & Manage Citations* command.

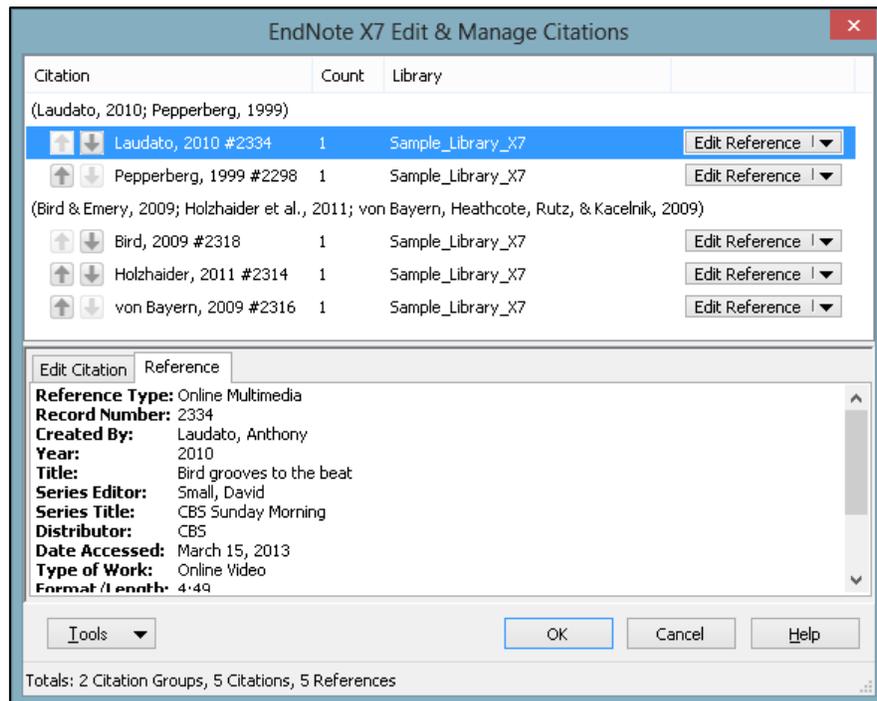
- Click on the citation you want to change, then click the **Edit & Manage Citations** button.



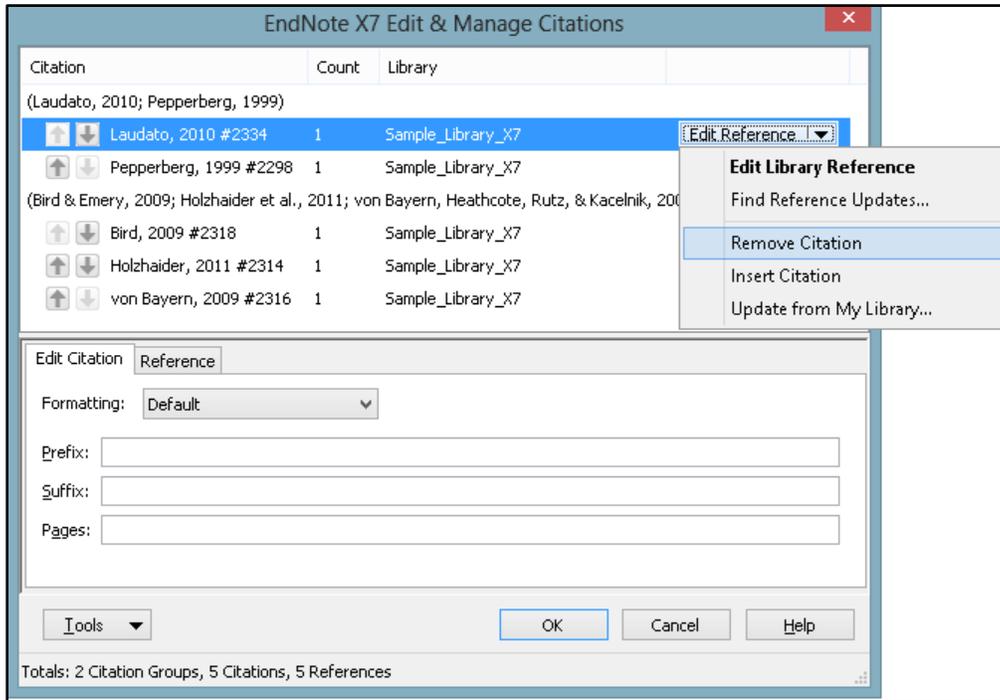
- In the *Edit & Manage Citations* window there are two tabs in the lower part of the window. The first tab, *Edit Citation* (shown below), contains fields where you can add prefix or suffix text to a citation, as well as page numbers for those styles that require them. There is also a drop-down *Formatting* list that provides options to put the author's name outside of the parentheses, exclude an author's name, exclude the year, or show the reference only in the bibliography.



- The second tab, *Reference*, shows the details for the selected (highlighted) reference in the top half of the window.



- Along with being able to add text to citations, you can also use the *Edit Reference* drop-down list for each reference to add new citations to the grouped citation with the **Insert Citation** command, or safely remove citations from a grouped citation with the **Remove Citations** command. This is the safest way to remove citations from a document because it safely removes all of the hidden coding. If the coding is not completely removed, it can result in a corrupted citation.



## 4.2 CITE WHILE YOU WRITE IN MICROSOFT WORD ON MACINTOSH

### 4.2.1 Installing the Cite While You Write Tools

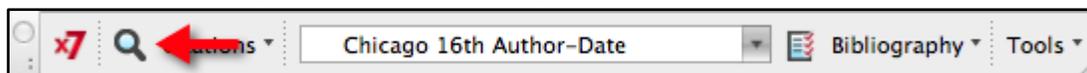
When you install EndNote it will automatically install files allowing EndNote and Word to communicate and enabling Cite While You Write (CWYW). In Word 2008 or 2011 you will see an *EndNote* menu under the *Word Tools* menu and an EndNote toolbar like the one below. (Note: It is best to close all other programs before installing EndNote, most especially Word and Outlook. When installing Word and EndNote on a new computer, always install Word first to enable EndNote to find it and be able to install the Cite While You Write tools. Also note that Word's Visual Basic **must** be installed to use Cite While You Write.)



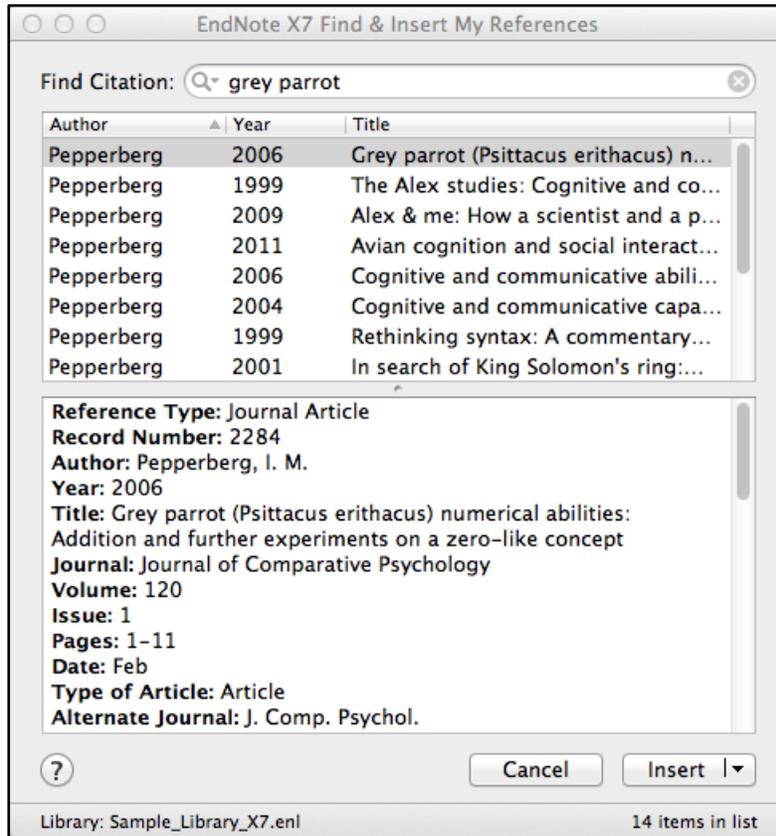
Below is information on using the Cite While You Write tools that you will need on a day-to-day basis.

### 4.2.2 Adding Citations to a Document Using Insert Citation

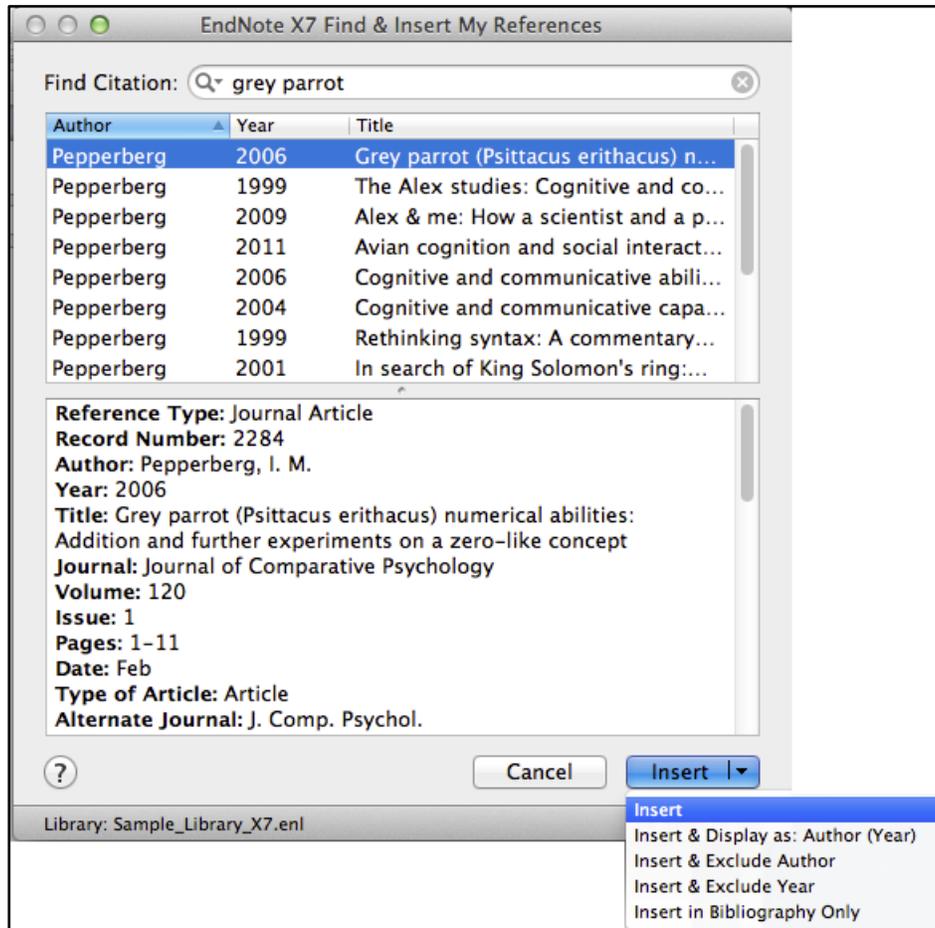
- Click the **Find & Insert My References** button (the magnifying glass button) on the EndNote toolbar in Word to open the *Find & Insert My References* window.



- In the *Find & Insert My References* window that appears, enter your search terms and press the **Return** key on your keyboard to bring up a set of references that contain those search terms. The terms can be anywhere in the EndNote record, but all the terms must be present in the same record.



- Next, select (highlight) the reference(s) you want to insert. When you select a single reference, you will see the details for that reference in the bottom part of the window, but details can be shown for only a single reference. However, you can select multiple references for insertion by holding down the **Command** key and clicking on them, then selecting your insertion options from the **Insert** list.



Your references will be inserted in the document and instantly formatted.

#### 4.2.3 Adding Citations to a Document Using Insert Selected Citations

- To select the citations you will insert in the document, return to EndNote by clicking the **Go to EndNote** button.



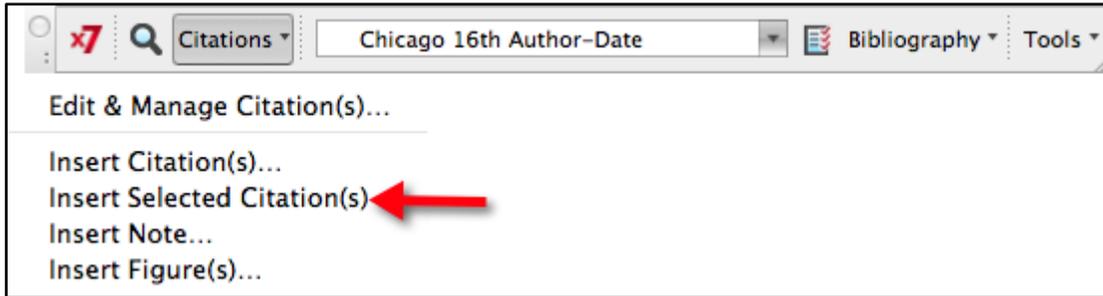
- In EndNote, select (highlight) the references you want to insert. You have two choices for how you insert them in the document.
  - You can insert them in the document from EndNote using the first button of the set shown below, **Insert Citation**. This will insert the references wherever your cursor is located in Word.



- If you would like to check if your cursor is in the correct location and then insert the references from within Word, in EndNote click on the third button shown in the set below, **Return to Word Processor**.



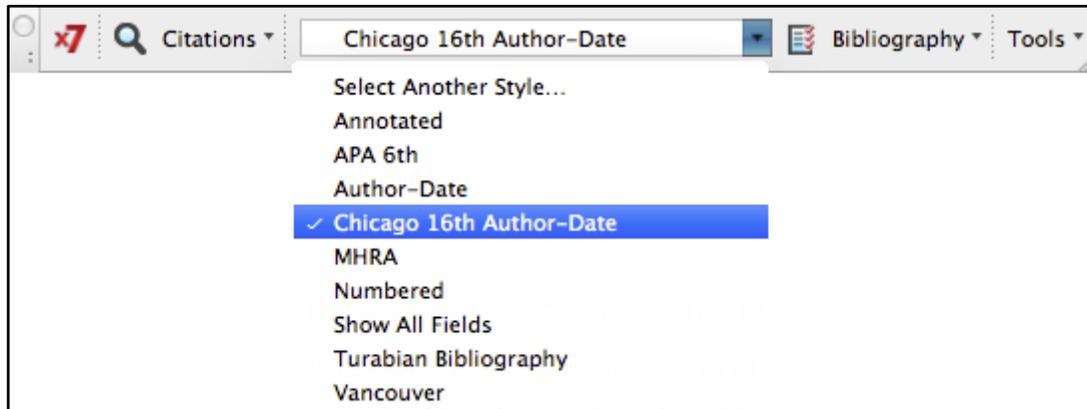
- If you returned to Word to insert the selected citations, click the **Citations** button, then select **Insert Selected Citation(s)** from the drop-down list.



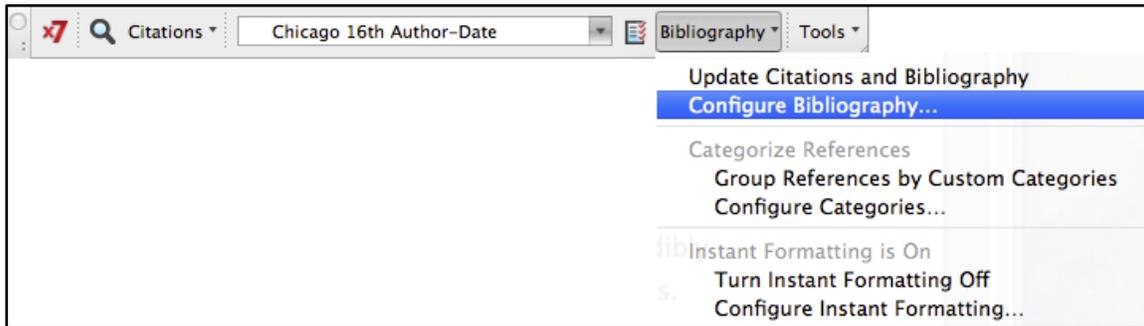
- Your references will be inserted in the document and instantly formatted.

#### 4.2.4 Selecting the EndNote Style for Your Citations and Bibliography

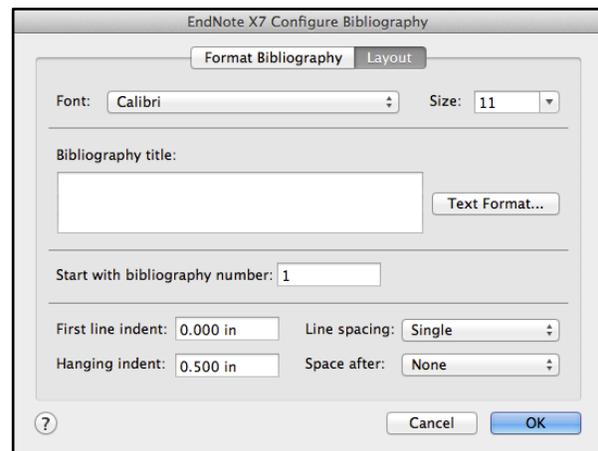
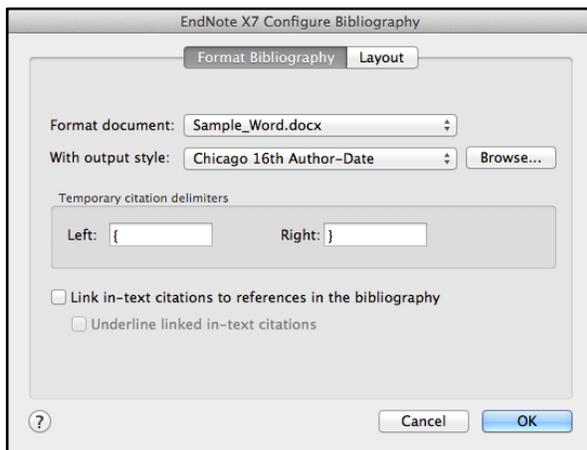
- To select the style for your citations and bibliography, select your preferred style from the drop-down style list as shown below, or select the **Select Another Style** option to see the list of EndNote styles available on your computer. (Note that a typical installation of EndNote only installs a list of popular styles. After installation, select **Customizer** from the **EndNote** menu to install more styles or download them from the EndNote web site.)



- If you would like more control over the formatting of the citations and bibliography, such as the ability to change the line spacing or set hyperlinking options between the citations and bibliography, select **Configure Bibliography** from the drop-down **Bibliography** list.



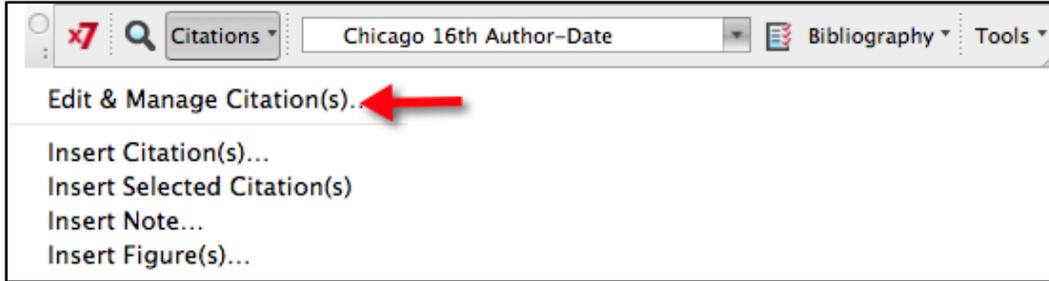
- The two tabs in the *Configure Bibliography* window provide options for changing the style, adding, removing, or formatting hyperlinks between citations and their matches in the bibliography, adding a centered title above the bibliography, changing the font used for the bibliography, and more. Select your options, then click the **OK** button to make your changes. Changing these options using Word commands would not effect permanent changes; you must use the *Configure Bibliography* command to permanently change options such as font or line spacing in the bibliography. (Note: Because simply clicking on a hyperlink in a Word for Macintosh document will activate the link, it is best not to turn on hyperlinking between citations and bibliography until you are finished working with the document.)



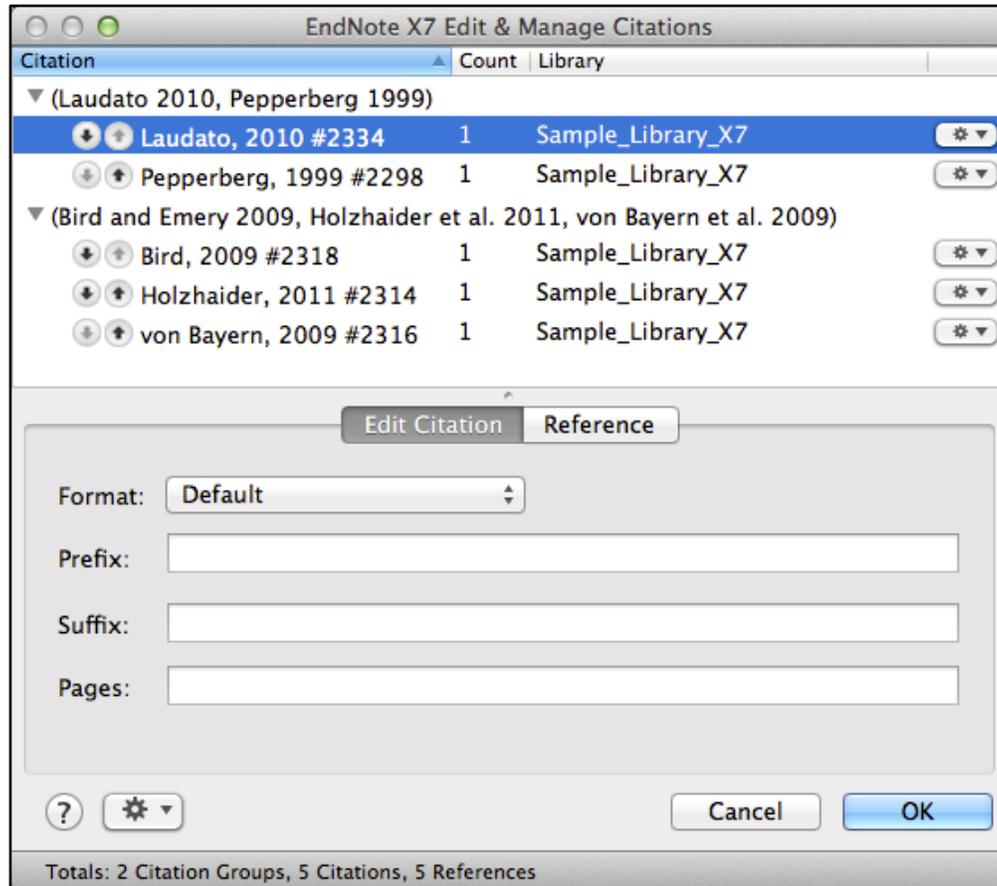
## 4.2.5 Editing Citations in the Document

If you try to edit citations in a document by simply typing the page numbers into a citation or removing an author's name from a citation, the change will only be temporary and will disappear with the next update of the bibliography. Worse than that, you risk corrupting the citation codes, which would prevent EndNote from updating them and could cause other problems in your document. The only safe way to make changes to the citations is using the *Edit & Manage Citations* command.

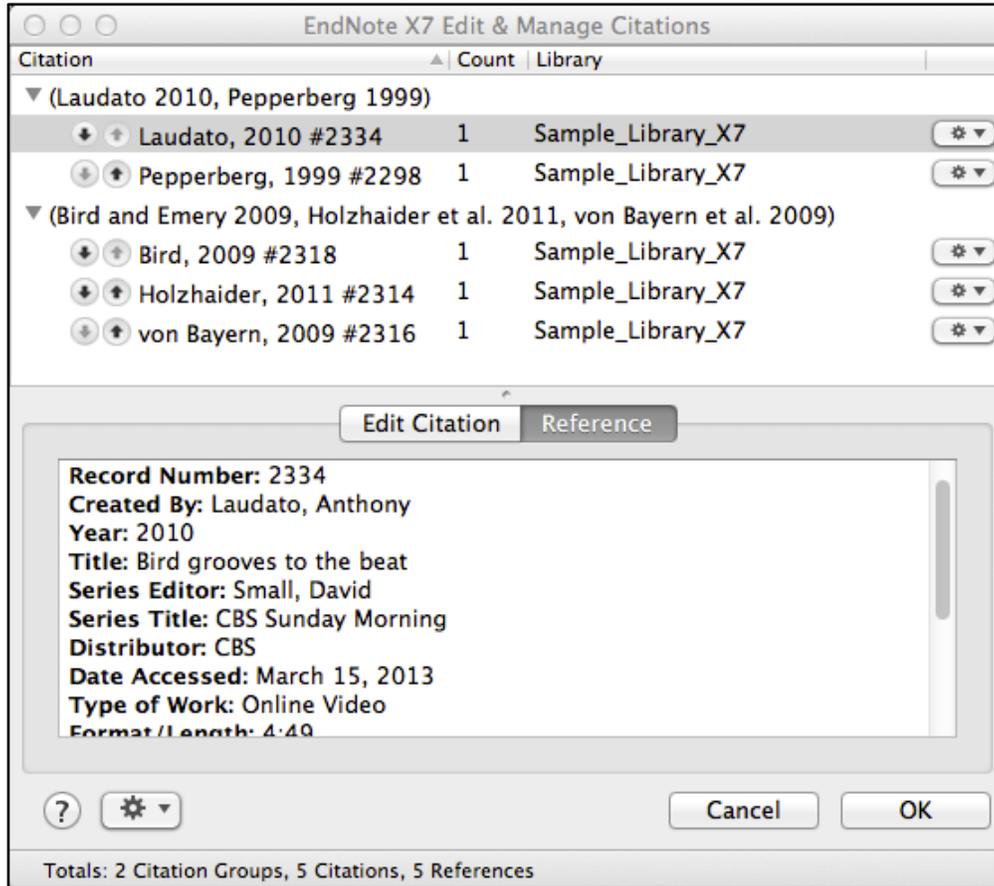
- Click on the citation you want to change, then click the **Citations** button and select **Edit & Manage Citations**.



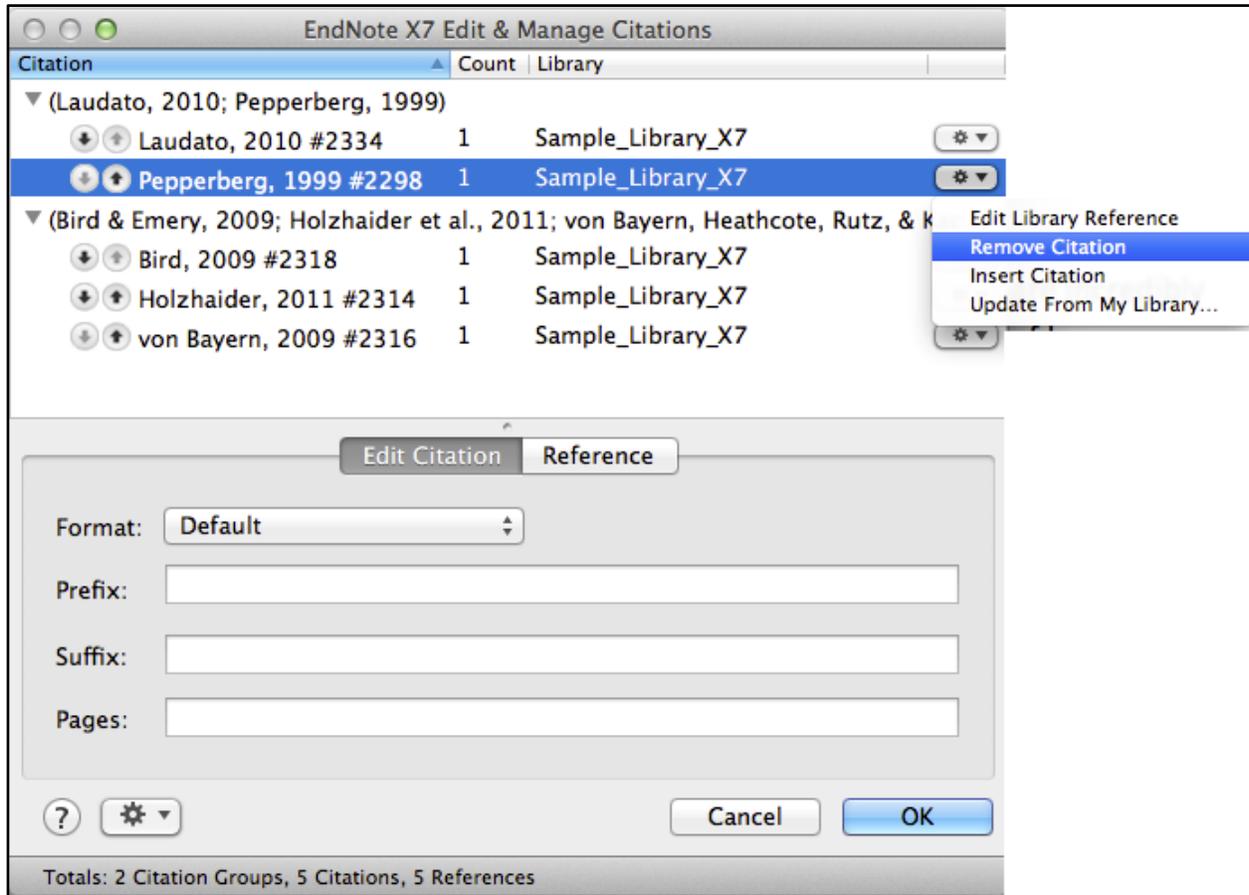
- In the *Edit & Manage Citations* window there are two tabs in the lower part of the window. The first tab, *Edit Citation* (shown below), contains fields where you can add prefix or suffix text to a citation, as well as page numbers for those styles that require them. There is also a drop-down *Format* list that provides options to put the author's name outside of the parentheses, exclude an author's name, exclude the year, or show the reference only in the bibliography.



- The second tab, *Reference*, shows the details for the selected (highlighted) reference in the top half of the window.



- Along with being able to add text to citations, you can also use the drop-down list at the right of each reference to add new citations to a grouped citation with the **Insert Citation** command, or safely remove citations from a grouped citation with the **Remove Citations** command. This is the safest way to remove citations from a document because it safely removes all of the hidden coding. If the coding is not completely removed, it can result in a corrupted citation.



## 5 INDEX

### C

- Cite While You Write, 33
  - Word for Windows, 33
    - Adding Citations, 33
    - Configuring the Bibliography, 36
    - Editing Citations, 36
    - Installing, 33
    - Selecting Styles, 35
  - Word on Macintosh, 38
    - Adding Citations, 39
    - Configuring the Bibliography, 42
    - Editing Citations, 42
    - Installing, 38
    - Selecting Styles, 41
- CWYW. *See* Cite While You Write

### D

- Direct Export, 5
  - Firefox on Macintosh, 14
  - Firefox on Windows, 12
  - Google Chrome on Windows, 16
  - Internet Explorer on Windows, 15
  - PubMed, 8
  - Web of Science, 5

### E

- EndNote Online Plug-In, 17
  - Firefox, 17
  - Internet Explorer, 17

### I

- Importing PDF Files, 19
  - On Macintosh, 20
  - On Windows, 19
- Importing References
  - PubMed, 8
  - Web of Science, 5

### P

- Preferences, Setting
  - PDF Handling, 21
    - On Macintosh, 22
    - On Windows, 21
- PubMed, 8
  - Not Using the Clipboard, 10
  - Using the Clipboard, 8

### R

- Reference Manager, 24
  - Converting to EndNote, 24

### T

- Thomson Reuters Web of Science. *See* Web of Science

### W

- Web of Science, 5
  - Not Using the Marked List, 6
  - Using the Marked List, 5